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ABSTRACT

The design of an evaluative study of a program for providing information and referral services (I&R) through a coordinated network of semi-autonomous I&R centers is described in this report. The program, implemented by the state of Wisconsin as a demonstration project from 1972-1974 was operated by the Division on Aging, Department of Health and Social Services. Its purposes were to provide for evaluative research into the usefulness of the I&R program to the elderly and other state residents seeking information regarding available human-services programs. This study includes a program description, project goals and research considerations, specific objectives and their underlying assumptions, criteria for determining the achievement of objectives, research strategy and methodology for evaluating the demonstration, and results of the evaluation. Appendices include forms and reports used in the I&R system: an I&R user survey with a user interview form and a structured interview for evaluation purposes, a summary of services delivered, and an I&R worker report. (Author/MBR)

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INFORMATION AND REFERRAL SERVICES: Evaluation Design for a Network Demonstration

BEST COPY AVAILABLE

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and
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FOREWORD

The design of an evaluative study of a program for providing information and referral (I & R) services through a coordinated network of semi-autonomous I & R centers is described in this report. The network program was implemented by the State of Wisconsin as a demonstration project in March 1972. It is operated by the Division on Aging, Department of Health and Social Services, with a combination of Federal, state, and local public and private funds and will run through September 1974. The purposes of the demonstration are to provide a site for evaluative research into the usefulness of the I & R program to the elderly and to serve Wisconsin residents seeking information about and referral to available human-services programs. The purpose of this paper is to make available information about the methodology used in the evaluation of this program. A series of final reports will present the findings of the evaluation.

Chapters One to Three were prepared by Nicholas Long and Chapters Five to Six were prepared by Leslie Yonce. The matrices of objectives, assumptions, and evaluation criteria in Chapter Four are the product of a combined effort by the authors with Eleanor Bolch, Steven Reiner, and Diane Tessari.

Nicholas Long, Ph.D.
Project Director
February, 1974

Other publications available from InterStudy

I&R Services: An Annotated Bibliography (June 1972)

WIS: An I&R Network (December 1972)

I&R Services: A Short History and Some Recommendations (1973)

Publications by InterStudy available from the Administration on Aging Office of Human Development DHEW

I&R Centers: A Functional Analysis (1971)

I&R Services: Reaching Out (1973)

I&R Services: The Resource File (1973)

I&R Services: Information-Giving and Referral (1974)

I&R Services: Volunteer Escort Services (working draft)

I&R Services: Follow-up (working draft)

I&R Services: The Role of Advocacy (working draft)

I&R Services: A Training Syllabus (out of print)

CONTENTS

iii	FOREWORD	
1	CHAPTER 1:	Description of a Program for Delivering Information and Referral Services
2		*Definition of Terms*
5	CHAPTER 2:	Project Goals and General Research Considerations
5		*General Project Goals*
6		*Program Objectives and Their Evaluation*
7		*A Note on the Nature of This Research*
9	CHAPTER 3:	Specific Objectives and Their Underlying Assumptions
10		*Nature of the Objectives*
11		*Target Population*
12		*Expected Outcomes*
13		*Table I: Information and Referral: Central Office Level*
14		*Table II: Information and Referral: Center Level*
17	CHAPTER 4:	Criteria for Determining the Achievement of Objectives
18		*Notes on Table III*
23		*Table III: Matrix of Objectives and Criteria for Evaluation*
37	CHAPTER 5:	Research Strategy and Methodology for Evaluating the Demonstration
37		*Achievement of Objectives*
39		*Differential Effects of Some Variables*

41		*Figure 1: Scheme for Program Implementation in the Network*
42		*Figure 2: The Wisconsin Information Service Network*
44		*Special Features of the Forms Used in This Demonstration*
47	CHAPTER 6:	Reporting Results of the Evaluation of the Wisconsin Demonstration
49		*Figure 3: Tentative Table of Contents of Information and Referral Center Study Final Report*
51	REFERENCES	
53	APPENDIX	Forms and Reports Used in the Wisconsin Information System
54		*Summary of Resource File Development*
55		*Resource File Development Time Breakdown Sheet*
57		*Caller Interview Form*
61		*Referral Form*
64		*Biographical Summary Sheet*
65		*Escort and Transportation Reimbursement Ticket*
67		*I & R Worker Report*
69		*Monthly Report of Grant Expenditures*
70		*Publicity Report Form*
71		*I & R User Survey*
73		*Summary of I & R Services Delivered (Manitowoc Center, October 1973)*
82		*Update for Manitowoc, October 1973*
83		*WIS Data, October 1973*
95		*Structured Interview for Evaluation*

CHAPTER 1: Description of a Program for Delivering Information and Referral Services

InterStudy* has developed the Wisconsin Information Service, a program for the delivery of information and referral (I & R) services, under a grant from the Administration on Aging, Office of Human Development, Department of Health, Education and Welfare (Grant 93-P-75051/5). We developed the program to achieve two primary goals: to increase the accessibility of human services for older Americans and to maximize the usefulness of I & R center data in the planning of human services. We designed the program to be as compatible with existing methods of providing I & R service as possible without losing sight of the two primary goals.

In brief, the program consists of a network of fairly autonomous I & R centers, each of which is engaged in one or more activities that are intended to help people make the best use of human services. These activities include providing information, making referrals, conducting systematic follow-through, supplying escort services, and conducting outreach programs. The basic activity, telephone-oriented information and referral, is the core to which each of the other services may be added. It is our hope that each of these additional

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services will help in a unique way to improve eligible individuals' access to the services they need. The program requires that all of the centers that participate in it be coordinated through the use of standardized procedures with regard to information that is stored in the resource file and information that is gathered from and about center users., (For more information about this program see Long, 1972.)

The autonomous centers are funded in part from a central administrative body, the Wisconsin Department of Health and Social Services, Division on Aging, by means of a franchise arrangement. In return for funding, the local center contractually commits itself to make specific I & R services available to the residents of the area it covers, and to collect and transmit to the Division on Aging certain data about its activities.

Further coordination of the network of centers is accomplished through support services, such as training and consultation, provided by the Division on Aging. This emphasis on coordination is intended to make data gathered by I & R centers as useful as possible in the planning of human services.

Definition of Terms

The words "information and referral" have come to have a variety of meanings. We offer the following definitions to clarify the discussion in this paper.

Resource File

The resource file is an organized, cross-indexed file of all services and programs available in the area served by the I & R center. Information about the development of a resource file is presented in the publication *Information and Referral Services: The Resource File* [Long *et al.*, 1973]

Information-Giving

Information-giving consists primarily of providing information about services and programs. It includes some effort to obtain background materials about the inquirer in order to determine his potential eligibility for a specific agency, but this is only a screening procedure; the actual determination of eligibility is left to the service facility. For further discussion, see *Information and Referral Services: Information-Giving and Referral* [Tessari *et al.*, 1974].

Referral

Although referral may be thought of as including such activities as "directing" or "steering" inquirers to appropriate agencies, the definition used in this program limits the term to the activity of making an appointment with a worker in another agency for persons who contact the I & R center. Obviously, not all inquirers will need this kind of referral.

Follow-Through

Our definition limits "complete follow-through" to those calls for which a referral was made. Follow-through requires contacting both the

inquirer and the agency to which he or she was referred to determine whether the inquirer reached the agency, whether the referral was appropriate, and whether the inquirer received the service requested. "Partial follow-through" with the inquirers alone may be provided for those individuals who did not receive a formal referral, but who were given direction or steering beyond the information-giving state. The decision to provide partial follow-through to such inquirers is left to the judgment of the I & R specialist.

Escort

Escort services consist of two independent activities: (a) providing transportation primarily for initial interviews with other agencies; and (b) providing a companion to help the inquirer complete forms and answer questions at the agency in the initial stages of contact. This service may be provided entirely by volunteers, or it may be paid for through the budget of the I & R center.

Outreach

Outreach is a case-finding activity in which the I & R center reaches out into the community to stimulate the use of existing programs and services by those who are not currently using them. Details of one approach to this kind of outreach are to be found in the publication *Information and Referral Services: Reaching Out* [Cushing and Long, 1973].

CHAPTER 2: Project Goals and General Research Considerations

We developed the Wisconsin demonstration program from our observations and analyses of existing methods of providing information and referral services. We designed it to be compatible with existing practices in the field, so there is actually nothing new in its elements; but the program in its full extent is unique in that no other system incorporates all of its elements. The major goals of this demonstration are therefore more practically than theoretically oriented. What we seek to learn about our work is the extent to which the program outlined in Chapter One achieves the objectives stated for it (see Chapter Three) and the answers to other relevant research questions that are implied in the program objectives (see Chapter Five). Although this demonstration cannot yield sufficiently reliable data to evaluate objectives at all levels of generality, we do expect that enough will be learned from it to provide administrators and policy-makers with sound information, which we hope will help them formulate decisions concerning the creation and operation of full-scale, coordinated networks of I & R centers.

General Project Goals

The ultimate purpose of the "I & R Center Study," as stated in the project proposal, "is to facilitate the development of a more effective and compre-

hensive system of information and referral centers." Five major goals are set to accomplish this purpose: (a) determination of the potential contribution of a network of I & R centers to the aged; (b) analysis of the feasibility and compatibility of various I & R center roles; (c) examination of the potential contribution of a network of I & R centers to the planning of human services; (d) development of operational guidelines for I & R centers; (e) development of operational guidelines to assist in the implementation of a network of centers. It is recognized in the project proposal that this work could be the prototype for the development of similar services for population groups other than the aged.

Program Objectives and Their Evaluation

Careful planning is necessary in order (1) to determine the usefulness of the system and procedures developed and described in the operational manuals (see page 48 in Chapter Six), and (2) to identify problem areas that need further refinement and to suggest what refinements might be made. A valuable reference for evaluating public service and social-action programs is the work of the late Edward A. Suchman [1967]. Suchman combines a comprehensive review of the pertinent literature with thoughtful contributions of his own on the requirements and the problems of evaluative research.

According to Suchman, "the most identifying feature of evaluative research is the presence of some goal or objective whose measure of attainment constitutes the main focus of the research problem" [page 37]. Suchman outlines several considerations that may be taken into account in the formulation of objectives for evaluative research; these can be expressed as six questions that the evaluation should answer:

(1) What is the nature of the content of the objective?
(2) Who is the target of the program?
(3) When is the desired change to take place?
(4) Are the objectives unitary or multiple?
(5) What is the desired magnitude of effect?
(6) How is the objective to be attained?

Because most programs have multiple objectives, there is always the possibility of confusion and disagreement among key people as to what the evaluation is supposed to be doing, and such confusion can seriously interfere with successful evaluation. Possible confusion can frequently be eliminated to a significant degree by classifying the objectives in some meaningful manner. The most common basis for ordering objectives is that of their degrees of

generality. This is the basis that has been used to order the objectives of the Wisconsin I & R network's central office and those of each individual I & R center. In both instances, the objectives are stated from the abstract, very general, and long-range to the fairly practical, specific, and immediate.

The long-range objectives may be thought of as statements of the ultimate purposes of the program (either at the level of the central office or that of an individual center). Suchman points out that these objectives provide us with: "(a) a theoretical reason for our program; (b) a fixed direction indicative of progress; and (c) a set of yardsticks which constitute the real standard against which all other measures of success must some day be validated..." On the other hand, "...it is the practical immediate objectives which represent the translation from purpose to program, and which make public services possible" [Suchman, 1967, page 52]. The immediate, intermediate, and long-range objectives formulated for the individual I & R centers in the Wisconsin demonstration and for the network as a whole are set forth in Chapters Three and Four of this document.

A Note on the Nature of This Research

The question may arise as to whether our research effort is "basic" or "applied." The answer is that it is both. This will become clearer as the objectives of the program and the criteria for evaluating them are considered. The program objectives range from a very broad, somewhat abstract statement of purpose (the ultimate or long-range objectives) to narrow, specific, and very practical activities. In our research we attempt to provide as thorough an evaluation as practical and feasible, given the constraints of time, manpower, methodology, and cost. To the extent that evaluation of some of the long-range program objectives is possible, the research will be "basic." However, when we have had to make decisions about research priorities, our major emphasis has been on "applied" research, with the goals of providing helpful information for program planning, development, and operation being given top priority.

The practical constraints are, as usual, primarily time and cost. In order to evaluate certain of the higher-level objectives in this particular program, the demonstration would have to run several years longer than is currently planned. A longer time would be necessary simply to lay the foundation of the program that is to be evaluated. And, of course, an extended duration of the program would have commensurate costs.

[redacted] [redacted]

CHAPTER 3: Specific Objectives and Their Underlying Assumptions

In the following tables the long-range, intermediate, and immediate objectives of the Wisconsin demonstration program are presented in conjunction with the assumptions underlying each. Objectives and assumptions for the demonstration at the level of the central office are listed in Table I; objectives and assumptions at the level of the individual center are presented in Table II.

The reader should recognize that some objectives may take much longer to achieve than others, and that the program would have to operate over a period of time, perhaps for several years, before a fair determination could be made of its success in meeting certain of the objectives. We hope that this understanding will somewhat lessen the political pressure for "instant results" with which evaluators must often contend.

In addition, the reader should recognize that services do not take place nor are program objectives achieved in isolation from support activities such as training, supervision, and community relations. Such support activities are crucial to the success of any program. Concern with all the activities necessary to the success of a program and not only with the explicitly service-related activities has been described as a "system-model" approach to evaluation [Etzioni, 1960; Levinson, 1966; Schulberg & Baker, 1968]. In this approach

all of the activities that are undertaken by the members of the program staff, including administrators and clerical personnel, are considered as an integrated whole; and the activities related to support and administrative services are recognized as significant to the accomplishment of the overall program objectives, rather than being only peripheral to the program's operations. This significance is indicated by including support and administrative activities among other, goal-oriented statements of program objectives.

The system-model approach leads to a more balanced and realistic appraisal of the costs and the benefits of the program or of component parts of it. It also allows evaluators to pinpoint more accurately the successes and failures of the program and the places where changes are needed in the administration and/or objectives of the program. Evaluation should be considered as a useful tool that can help modify programs on a continuing basis, rather than as a single momentous event that determines whether or not the program will be continued or terminated [Scriven, 1967; Wildavsky, 1972].

The objectives found in Tables I and II may be summarized in terms of the various considerations (see page 6) that entered into their formulation.

Nature of the Objectives

In specifying the objectives we discuss here, we have accepted the general position preferred by George James [1969]:

> Some students of administration speak of "objectives," "steps," and "activities" as a descending order, with each of the latter terms used to denote action taken to implement a former one. Others, including myself, prefer to use the single term "objective." These objectives are then considered as making up an ordered series, each of which is dependent for its existence upon an objective at the next higher level, and each in turn is implemented by means of lower level objectives... [page 31].

Rather than attempting to make fine discriminations among terms such as "goal," "purpose," "objective," "step," and so on, we use the one term, "objective." It is important to realize, of course, that we use the term "objective" to refer to a number of different concepts, ranging from the abstract formulation of policy to activities involved in service delivery and administration.

The objectives listed in Tables I and II fall into two broad categories, those that relate to policy and those that relate to operations. The operational objectives are further classified as either service objectives or management and administrative objectives.

Policy Objectives

The primary policy objectives of the demonstration program are (a) to investigate the usefulness of I & R as a way to improve connections between

people in need and the human services that can help them and (b) to help provide for the planning of human services by using information made available through I & R centers. The outcome of this investigation concerning an I & R network may be a decision to either expand, continue, or terminate the I & R network program as a means of improving the accessibility of human services to those in need of them or as a means of obtaining data for planning human services. Four statements (I, II-A, II-B, and IV-A) specify these policy objectives.

Operational Objectives

Of the twenty-nine statements of objectives, twenty-five can be considered to fall in the category of operational objectives. Five of those are explicitly related to direct service; the remaining twenty objectives are related to a greater or lesser degree to administrative or managerial activities.

The five service-related objectives bear directly on the provision of I & R services to the public served by the I & R center. These services include providing accurate, up-to-date information on human services; referral to service agencies; follow-through services to determine whether or not the I & R caller reached the agency; transportation and companion services to agencies; and outreach in the form of case-finding visits to the homes of the target population in order to inform them about services and to help facilitate their access to services.

The twenty managerial or administrative objectives can be categorized under five general headings:

(1) the selection and location of I & R centers,
(2) staffing patterns and staff training and supervision,
(3) community acceptance of the centers and their program,
(4) organization and maintenance of the resource file, and
(5) data collection and analysis for feedback and internal evaluation and for planners of human services.

Target Population

The I & R program is available to everyone without charge, but the effectiveness of the program in improving older persons' access to services they need is of particular interest and is receiving special attention in our analysis of data. Specific service objectives, such as outreach and escort, were included in the demonstration program because there was some evidence to suggest that these additional services, if provided by an I & R center, would be especially helpful to older persons in need of human services [REAL Service, 1969; National Council on the Aging, 1970; Long *et al.*, 1971].

Expected Outcomes

It is expected that the rates at which eligible persons contact human services available within the areas covered by I & R services will increase as a result of implementing the program components of escort, follow-through, and outreach; but specific projections with regard to how soon after their implementation the access rates will show an increase cannot be made. To control for changes in access rate that may be the result of other variables not within control of the program administrator, certain centers will not add these program variations. Data from these centers will be compared with data from the other centers to determine the validity of attributing change to the additional program components.

Desired Magnitude of Effect

There is too little information available on access to services by those who need them to permit the specification of an expected magnitude of effect. We hope that this evaluative research will lay the groundwork necessary to specify a desirable magnitude of effect for subsequent efforts to implement this or similar programs.

Methods of Reaching Objectives

Detailed procedures for implementing various aspects of this program are contained in a series of manuals prepared in conjunction with the development of program objectives. These manuals are listed on page 48 of Chapter Six.

TABLE I
INFORMATION AND REFERRAL: CENTRAL OFFICE LEVEL

Objectives	Underlying Assumptions
I Long-Range:	
Formulate policy concerning the best methods for helping individuals gain access to human services.	■ *There exists at present no comprehensive policy for optimizing the access of individuals to the providers of human services.* ■ *The formulation of such a policy is of high priority.*
II Intermediate:	
A Investigate the I & R network concept as one method of helping individuals gain access to human services.	■ *Multiple methods of helping individuals gain access to human services exist.* ■ *Of these methods, the I & R network concept is among the more promising.*
B Identify and develop the potential of the I & R network for contributing to the planning of human services.	■ *An I & R network has the potential for contributing to the planning of human services.*
III Immediate:	
A Implement the franchise approach to create a network of I & R centers.	■ *The franchise approach is an effective way of avoiding unnecessary duplication in the provision of I & R services.*
B Encourage the use of volunteers and nonprofessionals in the delivery of I & R services.	■ *Volunteers and nonprofessionals can deliver I & R services effectively.*
C Provide support services to develop and continue the I & R network operations:	
1 provide formal training for the staffs of network I & R centers;	■ *In order to orient local I & R staff to the objectives of the network program and acquaint them with the day-to-day routines of developing and maintaining an I & R center, the central office must provide formal training.*
2 provide continuing supervision and consultation (including in-service training) to the staffs of network I & R centers;	■ *Because professional consultation may not always be available at the center level, the central office must assume this responsibility.*
3 provide evaluation and feedback to individual centers.	■ *Continuing evaluation and feedback are effective methods of assessing and improving the quality of I & R service delivery.*
D Collect and analyze data:	
1 collect, assemble, and process information generated by participating I & R centers;	■ *Participating I & R centers will cooperate in providing complete and accurate data to the central office.*
2 analyze and interpret data collected from centers to provide pertinent information to planners at the state level.	■ *Data obtained from network operations are potentially useful to planners of human services at the state level.*
E Serve as a focal, coordinating point for all I & R programs not participating in the network.	■ *Coordination will help eliminate unnecessary duplication of services.* ■ *Coordination will facilitate information exchange among participants and thus lead to improvement in the quality of I & R services.*

TABLE II
INFORMATION AND REFERRAL: CENTER LEVEL

Objectives	Underlying Assumptions
IV Long-Range:	
A Increase the access to and the use of health and social services for users and potential users of the I & R center.	■ *Existing health and social services have the capacity for improving the quality of life of individuals who are in need.* ■ *Many individuals in need of health and social services do not use them.* ■ *A major reason individuals in need do not use existing health and social services is that there are barriers that prevent them from reaching such services. These barriers include:* *(a) lack of knowledge about services;* *(b) negative attitudes about services; and* *(c) concrete obstacles in getting to services such as:* *– ill health,* *– lack of transportation,* *– lack of financial resources, and* *– lack of interpersonal skills to deal with service personnel.*
B Provide reports about services and service needs that will enable service planners to make more rational recommendations about policy and changes in programs.	■ *It is possible to identify the specific kinds of data that are relevant to human services planners.* ■ *The recommendations of planners have a significant impact on decision-makers involved in developing service programs.*
V Intermediate:	
A Develop and use an advisory board.	■ *Advisory board representatives can help disseminate knowledge of the center's goals and activities in the community.* ■ *Advisory board representatives can provide valuable community feedback and guidance to the centers.* ■ *Advisory board members can help ensure widespread and continuing community support for the center.*
B Increase public awareness of the existence of human service facilities, including the I & R center:	■ *Some segments of the population have either no information or incorrect and incomplete information about human services that may be available to them; many persons in such subpopulations cannot be reached by less active methods.*
1 provide case-finding services (outreach);	■ *Case-finding is an effective method of directing the attention of these segments of the population to facilities and services that may be of use to them.*
2 provide publicity for the I & R center;	■ *Publicity is an effective method for directing the attention of the general public and certain specified segments of the population to facilities and services that may be of use to them.*
3 locate centers to increase their use by specific segments of the population.	■ *Physical location may determine which segments of the population use the I & R center.*
C Provide reports about services and needs that will enable local agencies and service planners to make more useful recommendations about day-to-day agency operations.	■ *Planners need feedback about day-to-day operations to make more useful recommendations.* ■ *Feedback information is more complete when data are generated both internally and externally to the agency.* ■ *The I & R center, as one external data source, has the potential to provide information useful to human service agencies regarding the impact of their day-to-day operations on the people the I & R center serves.*

Objectives	Underlying Assumptions
VI Immediate:	
A Create and maintain a resource file:	
1 gather facility information;	▪ *The information about community facilities and their services will enable the I & R center to give accurate information and make appropriate referrals.*
	▪ *The SEARCH Inventory is an appropriate tool to collect these data.*
2 set up resource file;	▪ *Information gathered from facilities must be readily and accurately retrievable if it is to be of use in providing I & R services to the community.*
	▪ *The recommended filing system is a convenient and efficient method to set up a resource file.*
3 update resource file on a continuing basis.	▪ *An up-to-date resource file increases the accuracy and thus the quality of the I & R service that a center can provide.*
B Develop and maintain facility interest and cooperation.	▪ *The objectives of the I & R center will be more easily met if good relationships are developed and maintained with community facilities.*
C Obtain and use a panel of local professional consultants whenever possible.	▪ *It is possible that situations may sometimes arise in daily I & R operations that are beyond the competence of nonprofessionals.*
D Operate the I & R center:	
1 provide accurate, up-to-date information about community health and social services;	▪ *An I & R center is capable of identifying a caller's problem and matching it with an appropriate community service.*
2 provide referrals to facilities for those callers who need them;	▪ *Community facilities will accept referrals.*
	▪ *A formal referral will increase the probability that a caller will use appropriate services.*
3 provide follow-through services to those callers who received referrals and to other callers who, in the opinion of the I & R specialist, have need of this service;	▪ *Follow-through increases the probability that a caller will use appropriate services.*
4 provide escort services to those who wish to receive escort; these services consist of:	▪ *Escort services will increase the probability that a caller will use appropriate services.*
a transportation to facilities,	▪ *Lack of adequate transportation is a major barrier preventing the elderly from obtaining needed services.*
b a companion to help negotiate initial contact with facilities.	▪ *It is reasonable to include transportation services as a component of an I & R center's program.*
	▪ *Fearful expectations, uncertainty, and the lack of interpersonal skills are major barriers that prevent elderly persons from obtaining needed human services.*
	▪ *A companion who can serve as an advocate for such an elderly person can diminish or eliminate these barriers. It is reasonable that the general I & R program include a service that supplies a companion or advocate to those who need such help.*
E Collect data on callers' needs and demographic characteristics.	▪ *Accurate data about callers' needs and demographic characteristics will help I & R centers to determine whether or not they are reaching the kinds of people they want to reach.*
F Collect data on callers' service experience, including that of the I & R center.	▪ *Accurate data about callers' experience with service facilities will enable facilities to be more helpful to those they serve.*

CHAPTER 4: Criteria for Determining the Achievement of Objectives

After long-range, intermediate, and immediate objectives have been formulated, it is necessary to determine how to know whether or not they are actually achieved. Four categories of criteria by which the success of a program may be assessed were originally suggested by George James [1969] in connection with the evaluation of public health programs. Edward Suchman [1967] discusses these categories in terms generally applicable to social programs and suggests a fifth category, the purpose of which is to determine why or how, as well as whether or not, an objective is achieved. The five categories, as Suchman defines them, are:

(1) Effort: "Evaluations in this category have as their criterion of success the quantity and quality of activity that takes place. This represents an assessment of input or energy regardless of output. It is intended to answer the questions 'What did you do?' and 'How well did you do it?' [page 61]."

(2) Performance: "Performance or effect criteria measure the results of effort rather than effort itself.... How much is accomplished relative to an immediate goal? Did any change occur? Was the change the one intended? [page 62]."

(3) Adequacy of Performance: "This criterion of success refers to the degree to which effective performance is adequate to the total amount of need....

Adequacy is obviously a relative measure, depending upon how high one sets one's goals [page 63]."

(4) Efficiency: "Efficiency is concerned with the evaluation of alternative paths or methods in terms of costs--in money, time, personnel, and public convenience. In a sense, it represents a ratio between effort and performance--output divided by input [page 64]."

(5) Process: This involves the determination of "how and why a program works or does not work. Strictly speaking, this analysis of the process whereby a program produces the results it does is not an inherent part of evaluative research.... However, an analysis of process can have both administrative and scientific significance, particularly where the evaluation indicates that a program is not working as expected....

"'Making sense' of the evaluative findings is the basic reason for adding a concern with process to the evaluation study [page 66]."

"The analysis of process may be made according to four main dimensions:

Attributes: "Specification of the attributes of the program that make it more or less successful. This type of evaluation attempts to diagnose specific causes of success or failure within the program itself. It requires a breakdown of the component parts of the program and the identification of those aspects which contribute to or detract from the overall effect of the program....

Recipients: "Which people are most affected by the program? Whom do you succeed in reaching and whom don't you reach? Who makes the best target population for the program--the individual, the group, the public? As end product or as influencer of others?

Conditions: "Under which conditions is the program more or less successful: locale, timing, auspices?

Effects: "What aspects of the final results are you going to use as your criteria of judgment? For example, effects of the program might be cognitive, attitudinal, or behavioral with respect to the population involved; they might be multiple or unitary, intentional or unintentional, of long or short duration [page 67]."

Each objective that has been formulated, regardless of its level of generality, may be assessed in terms of each of these criteria: effort, performance, adequacy of performance, efficiency, and process.

Notes on Table III

In the extended table at the end of this chapter (Table III), we set forth the specific means by which the achievement of each objective may be measured. The objectives of the network office are presented first and objectives for individual centers follow. This matrix is key to the evaluation efforts of this demonstration. We expect that the criteria contained in it will allow us to determine whether and to what degree each objective is achieved.

Bracketed numbers ranging from one to four indicate the relative feasibility of performing the evaluation of each objective-criterion intersection. The feasibility ratings were arrived at subjectively, taking into consideration

technological constraints (e.g., the adequacy of available methodology) of evaluating a particular intersection as well as the availability of resources (time, staff, and money) for the evaluation. A rating of one [1] indicates high feasibility; a rating of four [4] indicates low feasibility.

Asterisks beside some of the feasibility ratings indicate priority items; that is, those areas in which staff resources will initially be concentrated. The reader should understand that priority items may be added to or deleted from this initial set, depending upon what is learned during the course of the demonstration.

We were forced to be very brief in our statements of objectives for the presentation in Table III, and some readers may be confused by one or two of the terms we use. The next few paragraphs may help clarify such points.

Summary Explanation of Objectives

As stated in Chapter Three, the rationale for this whole program can be read in the statements of four objectives: I, II-A, II-B, and IV-A. These are, in summary: to investigate the usefulness of an information and referral network for improving connections between people in need and the human services that can help them; and to provide for the planning of human services by determining the usefulness of data that are available through the I & R network. All other objectives lead to this primary complex of objectives.

III-A Franchise Approach

Objective III-A, "the franchise approach," refers to the initial effort made by the program administrator to locate the demonstration sites in existing facilities that had community support to provide an I & R service. The intent of this approach was to draw on existing experience and expertise in providing I & R, where it existed, and to avoid unnecessary duplication of service.

III-B Volunteers and Non Professionals

Objective III-B, concerning the use of volunteers and non professionals, stems from a question concerning the necessary characteristics of manpower needed to operate I & R services. Existing practice is biased toward professional social workers (generally those possessing an M.S.W.). However, there is also some undocumented evidence to suggest that this level of training is not a necessary prerequisite for successfully providing I & R services. Given the limited supply of highly trained professionals, it was decided to encourage the employment of individuals with a wide variety of educational and employment experience in this program. By analyzing and comparing the effectiveness of different groups of employees with regard to job performance, we hope to provide better information to administrators about the manpower needs for this field of service.

III-D Data Collection and Analysis

The sub-objectives listed under III-D concern the general policy objective of determining the value of I & R network data for planning human services. The network office has the greatest responsibility for realizing this objective; this frees the centers of data-analysis and reporting responsibilities and permits their full concentration on providing I & R services. The network office is committed to giving each center routine data reports about the center's operations and special reports that are within the capabilities of the network office to prepare. All data from a center's operations are always available if the center chooses to allocate some of its resources for data analysis.

III-E Coordination

This objective complements III-A and concerns the general goal of conserving resources and avoiding unnecessary duplication of effort. This objective is vital at the present time because of the fragmented support of I & R services by governmental authorities. A number of different and disconnected sources provide funds for I & R services to specific categories of individuals. The potential result is repeated duplication of effort in the delivery of I & R service in the same geographic area (for example, employment-related I & R, developmental-disabilities I & R, I & R for welfare clients, and I & R for the aging). Because the network we developed has a state-wide perspective, it seems reasonable for its staff to make every effort to contact existing and developing I & R services to help coordinate, rather than duplicate, I & R services.

V-B Publicity

The three sub-objectives listed under V-B reflect different ways to increase public awareness of human service facilities by increasing public awareness of I & R services. These three sub-objectives are actually separate approaches. The first, developing an outreach capability, is a complex endeavor in itself.* No less complex--although of a totally different nature--are the techniques of providing publicity for the center. Equally vital, but in most cases feasible only in the planning stages, was locating the centers to increase their use by specific subpopulations; this sub-objective was, of course, not allowed to conflict with objective III-A.

VI-C Consultation

Because we chose to encourage volunteer and non-professional manpower, we decided that some back-up by professional consultants would be needed to help in emergency situations or to review the way more difficult cases were handled. Pursuing this objective may also help to develop and maintain community contacts and support for the service.

**See especially Cushing and Long, 1973.*

VI-D-2 Referral

Formal referral, in the sense of making appointments for clients (see Chapter One), is a more active way of improving connections with the service system than merely giving information.

VI-D-3 Follow-Through

Recontacting the caller to show concern and see if the I & R center can be of further assistance is another method of helping to connect the caller to the service system. This activity naturally could lead to advocacy by the I & R service for the caller, yet another technique that should improve the chances of the caller being connected to the appropriate service.

VI-D-4 Escort and Transportation

Transportation and companion services are further steps that the I & R service could take to enhance the connection between people and services. Taken together with the follow-through effort, they may strengthen the effectiveness of the I & R program in accomplishing its primary objective of linking people to services.

VI-E and VI-F Data Collection

Data-collection activities are integrated in the daily routine of providing I & R services. Standardized forms are used and analysis of the data is conducted at the central network office. Standard data reports are provided to each center every month. The reports include data specific to each center, along with aggregate data for the entire network, so that each center can assess its performance in a state-wide context (see the Appendix, pages 73-94). Raw data are available to each center for internal use.

TABLE III Matrix of objectives and criteria for evaluation

Following is a matrix that relates objectives with criteria for determining the attainment of each objective. Estimates of the feasibility of measuring each criterion are indicated by numbers in brackets ([1] = high feasibility); high priority status of an objective-criterion intersection is shown by an asterisk next to the feasibility rank. Small roman numerals have been used where more than one criterion is listed in a single cell of the matrix to simplify references to the table.

TABLE III

LONG-RANGE OBJECTIVES – I & R NETWORK OFFICE

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	Performance	Adequacy of performance	Efficiency	Process
I Formulate policy concerning the best methods for helping individuals gain access to human services.	i [4] *Man hours spent in policy research in this area* ii [4] *Cost of policy research in this area*	[2] *Policy formulated in this area*	i [4] *Acceptance of policy by those charged to implement it* ii [4] *Improvement of the quality of life of individual citizens of our society*	[4] *Utility of this approach in terms of time and cost as compared with alternative methods of policy development*	[4] *Those attributes of the policy formulation process and its product that contribute to acceptance or rejection*

INTERMEDIATE OBJECTIVES – I & R NETWORK OFFICE

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Efforts	Performance	Adequacy of Performance	Efficiency	Process
II-A Investigate the I & R network concept as one method of helping individuals gain access to human services.	i [3] *Man hours spent in initiation, operation, and ongoing evaluation of an I & R network* ii [1] *Cost of these activities*	[1] • *An operating I & R network*	[3] • *Determination of the feasibility and desirability of this method for helping individuals gain access to human services*	[4] *Comparison of this method with alternative methods of helping individuals gain access to human services*	i [3] • *Factors that contribute to success or failure of the investigation* ii [3] • *Demographic characteristics of the population exposed to the program* iii [3] • *Conditions affecting success or failure (timing, location, auspices)* iv [3] • *Effects of investigation intended or unintended*
II-B Identify and develop the potential of the I & R network for contributing to the planning of human services.	i [4] • *Man hours spent in this activity* ii [4] *Cost of this activity*	[1] • *Report or statement about the potential*	[4] • *Capacity of an operating I & R network to contribute to the planning of human services*	[4] • *Comparison of the I & R network capacity with other inputs to the planning process*	[4] • *Characteristics of the network that contribute significantly to the planning process*

IMMEDIATE OBJECTIVES – I & R NETWORK OFFICE

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	**Performance**	**Adequacy of performance**	**Efficiency**	**Process**
III-A Implement the franchise approach to create a network of I & R centers	i [4] *Man hours spent in identifying existing I & R centers and encouraging participation in the network* ii [4] *Cost of this activity*	[2] *Number of I & R centers identified*	[3] *Proportion of network I & R centers which existed before joining the network (adjusted for locales where there were no pre-existing centers)*	i [4] *Time per center to bring it into the network* ii [4] *Cost per center to bring it into the network*	i [4] *Identification of successful approaches to get centers to join* ii [3] *Characteristics of existing centers which join or do not join the network* iii [4] *Conditions affecting an existing center's decision to join or not join* iv [4] *Effects of network membership on acceptance and utilization by the public*
III-B Encourage the use of volunteers and non-professionals in the delivery of I & R services.	i [3] *Man hours spent in promoting use of volunteers and non-professionals* ii [3] *Cost of this activity*	i [1] * *Number of volunteers working in each center* ii [1] * *Number of non-professionals working in each center*	i [1] * *Proportion of total man hours that are provided by volunteers in each center* ii [2] * *Proportion of total man hours that are provided by non-professionals in each center*	[3] *Alternative methods of promoting utilization of volunteers and non-professionals*	[3] * *Comparisons among professional, non-professional, paid, and volunteer staff in respect to performance of various I & R activities, (accuracy of referrals, client feedback, etc.)*
III-C Provide support services to develop and continue the I & R network operations:					
1 Provide formal training for the staffs of network I & R centers;	i [1] *Man hours spent in training* ii [1] *Cost of training*	i [1] *Number of training sessions* ii [1] *Number of persons trained*	i [2] * *Evaluation of training sessions by trainees* ii [4] *Adherence of local staff to state guidelines*	i [1] *Time per session* ii [1] *Cost per session* iii [1] *Number of training days* iv [3] *Alternative methods of training staff*	i [2] *Attributes of training program (films, role playing, lectures, readings) that contribute to success or failure* ii [3] *I & R centers most/least responsive* iii [2] *Conditions affecting success or failure (distance from network office, personnel, location, auspices)* iv [4] *Effects of training program on I & R centers in terms of program effectiveness and quality*

IMMEDIATE OBJECTIVES – I & R NETWORK OFFICE

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	Performance	Adequacy of performance	Efficiency	Process
III-C (continued) Provide support services to develop and continue the I & R network operations:					
2 Provide continuing supervision and consultation (including in-service training) to the staffs of network I & R centers;	i [2] * *Man hours spent in supervision and consultation* ii [2] * *Cost of supervision and consultation*	i [3] *Number of consultations (visits, phone calls, etc.; adjust for local consultation)* ii [4] *Number of persons consulted* iii [4] *Feedback to network office from centers*	i [4] *Changes in I & R staff activities* ii [3] *Changes in network guidelines and standards*	i [2] *Time for consultation per center* ii [2] *Cost for consultation per center* iii [4] *Alternative methods of improving I & R staff activities* iv [3] *Alternative methods of improving network guidelines*	i [3] *Attributes of consultation that lead to improvement of staff activities and network guidelines (frequency, kind – phone, personal interview, etc.)* ii [3] *I & R centers most/least responsive* iii [3] *Conditions affecting success or failure (distance, personnel, location, auspices)* iv [4] *Effects of support functions on I & R centers and on network office*
3 Provide evaluation and feedback to individual centers.	i [3] *Man hours spent in evaluation feedback* ii [3] *Cost of this activity*	[2] *Evaluation feedback to centers: (a) written reports (b) conferences (at various levels) (c) newsletter*	i [4] *Changes in operations of network I & R centers* ii [3] *Changes in operational materials and instructions, including: (a) standards (b) guidelines (c) manuals* iii [3] *Evaluation by centers of feedback information*	i [3] *Evaluation feedback time per center* ii [3] *Evaluation feedback cost per center*	i [3] *Attributes of evaluation components which result in improvement of center operations* ii [3] *Characteristics of centers most/least responsive to evaluation process* iii [2] *Conditions affecting success or failure (timing, auspices, etc.)* iv [4] *Effects of evaluation process on centers (center operations, staff, etc.)*

III-D **Collect and analyze data:**					
1 **Collect, assemble, and process information generated by participating I & R centers;**	**i [2] •** *Man hours spent in this activity* **ii [2] •** *Cost (including data processing costs) of this activity*	**[1]** *Summary reports*	**i [3]** *Completeness of reports* **ii [3]** *Adequacy of reports*	**i [2]** *Time per report* **ii [2]** *Cost per report*	**i [2] •** *Identification of strengths and weaknesses of data reporting system* **ii [2]** *Characteristics of network centers that facilitate or impede process* **iii [2]** *Conditions affecting reporting information by centers* **iv [3] •** *Identification of positive and negative effects attributable to the data reporting process*
2 **Analyze and interpret data collected from centers to provide pertinent information to planners at the state level.**	**i [2]** *Man hours spent preparing and disseminating such information (including reports, testimony, etc.)* **ii [2]** *Cost of this activity*	**i [1]** *Number of presentations (reports, conferences, consultations, testimony, etc.)* **ii [2]** *Scope of clientele*	**i [3]** *Proportion of potential audience reached* **ii [4] •** *Policy recommendations which make use of such information*	**i [3]** *Time per presentation (report, testimony, etc.)* **ii [3]** *Cost per presentation (report, testimony, etc.)* **iii [3]** *Alternative methods of preparing and disseminating information* **iv [4]** *Alternative methods of influencing planners*	**i [3] •** *Attributes of information dissemination procedures which make it useful to planners* **ii [3] •** *Characteristics of those receptive to information* **iii [2] •** *Conditions affecting reception and use of information* **iv [4] •** *Effects of use of information on the process of providing that information*
III-E **Serve as a focal, coordinating point for all I & R programs not participating in the network.**	**i [3] •** *Man hours spent in coordination activities* **ii [2] •** *Cost of these activities*	**i [2]** *Number of centers contacted* **ii [2] •** *Number of centers coordinating with network*	**i [2]** *Proportion of non-network I & R programs contacted* **ii [2] •** *Proportion of non-network I & R programs contacted that are coordinated with network*	**i [3]** *Time per contact* **ii [2]** *Cost per contact* **iii [4]** *Alternative methods of coordinating I & R programs*	**i [2] •** *Components of the network program with which other centers are willing to coordinate* **ii [2] •** *Kinds of centers willing (or not willing) to coordinate (e.g., auspices, location, population served)* **iii [2] •** *Conditions required by other centers if coordination is to take place* **iv [3]** *Effects of coordination on community, other I & R programs, network (types of calls, volume of calls, characteristics of callers, etc.)*

LONG-RANGE – SINGLE I & R CENTER

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	Performance	Adequacy of performance	Efficiency	Process
IV-A Increase the access to and the use of health and social services for users and potential users of the I & R center.	i [2] • *Man hours spent in I & R activities* ii [3] • *Cost of I & R activities*	i [1] • *Number of people receiving I & R services* ii [1] • *Number of I & R center users who go on to use other agency services*	[1] • *Proportion of I & R center users who need other agency services and who go on to use them*	i [2] • *Time per I & R center user* ii [2] • *Cost per I & R center user* iii [4] *Alternative methods of providing people with access to agencies (e.g., increased correct referrals in established I & R centers which adopt our model, reduced number of mis-referrals to agencies from other sources)*	i [3] *Attributes which contribute to success or failure* ii [3] *Recipients – characteristics of those who are and who are not reached* iii [3] *Conditions affecting success or failure (I & R center location, auspices, hours open, etc.)* iv [3] *Effects on community, agencies, I & R center. (Knowledge, attitude, behavior.) Duration of such effects. Side effects.*
IV-B Provide reports about services and service needs that will enable service planners to make more rational recommendations about policy and changes in programs.	i [3] *Man hours spent in consultation with planners and decision-makers* ii [3] *Man hours spent in report production and dis-semination* iii [2] *Cost of each*	i [1] *Number of special reports, etc., prepared for planning* ii [3] *Number of consultation contacts*	i [4] • *Uses to which I & R data are put by planners* ii [4] *References to such data in recommendations by planners* iii [4] • *Policy changes attributable to I & R data*	i [3] *Time per report or consultation, etc.* ii [2] *Cost per report or consultation, etc.* iii [4] *Alternative methods for gathering data* iv [4] *Alternative methods for influencing decision-makers (e.g., political rather than analytical considerations)*	i [3] • *Attributes which contribute to acceptance or rejection of I & R data* ii [4] *Recipients – those who do and who do not use data* iii [3] • *Conditions affecting success (timing, political climate, local economic situation)* iv [3] • *Effects on community, agencies, I & R center, center-agency relationships. Duration of such effects. Side effects.*

INTERMEDIATE OBJECTIVES – SINGLE I & R CENTER

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	**Performance**	**Adequacy of performance**	**Efficiency**	**Process**
V-A Develop and use an advisory board.	i [1] *Man hours devoted to advisory board activities* ii [1] *Cost of advisory board activity*	[1] *Existence of an advisory board*	i [2] *Number of meetings with advisory board* ii [3] *Evaluation of help given by the advisory board*	i [1] *Time spent preparing for board meetings* i [1] *Time spent in board meetings* i [3] *Cost of board meetings*	i [3] *Attributes of board that make it helpful or not helpful* ii [4] *Conditions affecting success of board contributions (members' contacts, influence, etc.)* iii [3] *Unexpected effects of board contributions*
V-B Increase public awareness of the existence of human service facilities, including the I & R center:					
1 Provide case-finding services (outreach);	i [2] • *Man hours spent in case-finding, including supervisory time* ii [2] • *Cost of case-finding activities*	i [1] • *Geographic area covered* ii [1] • *Number of attempted contacts* iii [1] • *Number of persons actually contacted in geographic area* iv [1] • *Number of contacted persons identified as in need of human services*	i [2] • *Proportion of persons in geographic area who are actually contacted* ii [1] • *Proportion of persons contacted who accept I & R service* iii [2] • *Demographic differences of population accepting I & R services through case-finding efforts from population of those initiating contact with I & R center*	i [2] • *Time per contact* ii [2] • *Cost per contact* iii [3] *Alternative methods of outreach*	i [2] *Attributes of outreach program which contribute to success or failure* ii [2] • *Recipients – characteristics of those unreachable; of those who reject I & R service* iii [3] *Conditions affecting success or failure (geographic area selected, timing, etc.)* iv [2] • *Effects on population canvassed, agencies, I & R center. (Knowledge, attitude, behavior.) Duration of such effects. Side effects.*

INTERMEDIATE OBJECTIVES – SINGLE I & R CENTER

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	Performance	Adequacy of performance	Efficiency	Process
V-B (continued) Increase public awareness of the existence of human service facilities, including the I & R center:					
2 Provide publicity for the I & R center;	i [3] *Man hours spent in developing publicity materials* ii [3] *Man hours spent in monitoring publicity* iii [1] • *Man hours spent disseminating publicity* iv [1] • *Cost of disseminating publicity*	i [2] *Media measurements (e.g., spots on T.V., radio; newspaper inches)* ii [1] *Number of publicity items distributed*	[3] • *Proportion of I & R center contacts resulting from different kinds of publicity efforts*	i [3] *Time per publicity item* ii [2] *Cost per publicity item* iii [2] *Alternative methods of publicizing I & R center*	i [3] • *Attributes of publicity program which contribute to success or failure* ii [3] • *Recipients — characteristics of those who respond to publicity* iii [3] *Conditions affecting success or failure* iv [2] *Effects on community, agencies, I & R center (knowledge, attitude, behavior); duration of such effects; side effects*
3 Locate centers to increase their use by specific segments of the population.	[1] • *Physical location of some centers in settings more likely to attract certain identifiable segments of the population. (e.g., in senior centers)*	[1] • *Proportions of population segments served by centers located in different settings*	[2] • *Relative proportions of population segments served across centers in different settings*	i [3] • *Cost of locating centers in different settings* ii [3] • *Alternative methods of increasing utilization by certain groups (e.g., publicity, outreach)*	i [3] *Attributes of center location that lead to increased utilization by certain groups* ii [2] • *Recipients — characteristics of population segment attracted to different locations* iii [3] *Conditions affecting success or failure of location in different settings* iv [3] *Effects of location in different settings*

V-C **Provide reports about services and needs that will enable local agencies and service planners to make more useful recommendations about day-to-day agency operations.**	**i [3]** *Man hours spent in report production and dissemination* **ii [2]** *Cost of report production and dissemination*	**[1]** *Number of reports prepared*	**[1]** *Number of requests for reports*	**i [3]** *Time per report* **ii [2]** *Cost per report* **iii [3]** *Alternative methods of data dissemination* **iv [4]** *Alternative methods of influencing planners*	**i [3]** *Attributes which contribute to acceptance or rejection of reports* **ii [4]** *Recipients – those who do and do not use reports* **iii [3]** *Conditions affecting success or failure (auspices of I & R center, timing, etc.)* **iv [4] •** *Effects on community, agencies, I & R center, center-agency relationships. Duration of such effects. Side effects.*

IMMEDIATE OBJECTIVES – SINGLE I & R CENTER

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	**Performance**	**Adequacy of performance**	**Efficiency**	**Process**
VI-A Create and maintain a resource file:					
1 Gather facility information;	**i [2] •** *Man hours spent in obtaining information (correspondence, phone calls, questionnaire administration, interview, etc.)* **ii [2] •** *Cost of gathering facility information*	**[1] •** *Number of facilities on whom service information was gathered*	**i [1] •** *Proportion of facilities contacted on which data were gathered* **ii [3] •** *Completeness of facility information* **iii [3] •** *Accuracy of facility information*	**i [2] •** *Time per facility contact* **ii [2] •** *Cost per facility contact* **iii [4]** *Alternative methods for gathering data (e.g., different instruments, method of contact)*	**i [2]** *Attributes of data-gathering instruments which contribute to success or failure* **ii [2]** *Qualities of I & R staff which encourage or inhibit agency cooperation.* **iii [2]** *Facilities which do and do not cooperate* **iv [3]** *Conditions affecting success or failure (auspices of I & R center, timing of data-gathering, etc.)* **v [3]** *Effects on facilities in terms of their attitudes about the I & R center*
2 Set up resource file;	**i [2] •** *Man hours spent in setting up resource file* **ii [2] •** *Cost of setting up resource file*	**[1] •** *Completed resource file*	**i [3]** *Completeness of file* **ii [3]** *Accuracy of file*	**i [2]** *Time per entry into file* **ii [2]** *Cost per entry into file* **iii [3]** *Alternative filing systems* **iv [3]** *Alternative equipment*	**i [2] •** *Attributes of filing system and equipment which contribute to success or failure* **ii [2] •** *Staff problems in setting up resource files* **iii [3]** *Conditions affecting success or failure* **iv [1] •** *Effects on information retrieval*

IMMEDIATE OBJECTIVES – SINGLE I & R CENTER

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	Performance	Adequacy of performance	Efficiency	Process
VI-A (continued) Create and maintain a resource file.					
3 Update resource file on a continuing base.	i [3] *Man hours spent in updating file (phone calls, correspondence, etc.)* ii [3] *Cost of updating resource file*	i [1] * *Number of facility files updated each month* ii [2] *Number of new facilities added to file each month*	i [3] *The degree to which facility information is current* ii [1] * *Proportion of facilities responding to update requests* iii [3] *Proportion of new facilities identified and added to resource file during each update period*	i [2] * *Time per update* ii [3] *Cost per update* iii [3] *Alternative methods for updating (e.g., different frequency or kind of contact)*	i [3] *Attributes of updating methods which contribute to success or failure* ii [2] *Facilities which do and do not cooperate. Facilities which cooperate passively (respond to calls) or actively (spontaneously inform I & R center of change)* iii [3] *Conditions affecting success or failure (auspices of I & R center, timing of inquiries, kinds of contact, etc.)* iv [2] *Effects on relations with facilities*
VI-B Develop and maintain facility interest and cooperation.	i [4] *Man hours spent in conversation and correspondence with facility contacts (explaining program, exchanging information, follow-through, etc.)* ii [4] *Cost of this activity*	i [2] *Number of facilities personally contacted* ii [3] *Number of contacts per facility*	i [3] *Proportion of facilities in area contacted* ii [2] *Perceived cooperativeness of facilities*	i [4] *Time spent in special efforts in these areas* ii [4] *Cost per special effort in these areas* iii [4] *Alternative methods of developing and maintaining interest and cooperation*	i [4] *Attributes of method used which contribute to success or failure* ii [3] *Qualities of I & R stuff which encourage or inhibit facility interest and cooperation* [2] *Facilities that do and do not become interested and cooperative* iii [4] *Conditions affecting success or failure (auspices of I & R center, timing of contacts, etc.)* iv [4] *Effects on success of referrals or follow-through and of efforts to update file*

VI-C **Obtain and use a panel of local professional consultants whenever possible.**	**i [3]** *Time spent in seeking and using professional consultants*	**[1]** *Number of consultants used by I & R center*	**i [2]** *Frequency with which each consultant is used* **ii [4]** *Assessment of the quality of help provided by each consultant*	**i [2]** *Time per consultation* **ii [2]** *Cost per consultation* **iii [3]** *Cost of consultation per caller*	**i [3]** *Characteristics of consultants which are considered most helpful (e.g., professional experience, familiarity with community)* **ii [2]** *Kinds of callers requiring consultation; characteristics of staff using consultants* **iii [4]** *Conditions affecting success or failure of consultation* **iv [4]** *Effects of consultation on staff, public acceptance of center*
VI-D **Operate the I & R center:**					
1 **Provide accurate, up-to-date information about community health and social services;**	**i [3] •** *Man hours spent in information-giving, including supervision* **ii [2] •** *Cost of providing information only*	**[1] •** *Number of callers receiving information only*	**i [2] •** *Appropriateness of information* **ii [2] •** *Proportion of callers who acted on information by seeking service* **iii [3] •** *Quality of service received by those who sought it*	**i [3] •** *Time spent per caller* **ii [2] •** *Cost per caller*	**i [2] •** *Attributes which contribute to success or failure (categories of information sought, quality of resource file, efficiency of retrieval system, etc.)* **ii [2] •** *Recipients – demographic characteristics of those seeking information* **iii [4]** *Conditions affecting success or failure (I & R center location, auspices, hours open, etc.)* **iv [4]** *Effects on I & R center users, facilities, I & R center*
2 **Provide referrals to facilities for those callers who need them;**	**i [3] •** *Man hours spent in providing referral, including supervision* **ii [3] •** *Cost of providing referral*	**[1] •** *Number of callers receiving referral*	**i [1] •** *Proportion of callers referred who kept referral appointments* **ii [1] •** *Proportion of referrals that were appropriate. An appropriate referral is defined as one in which the individual is accepted for service by the facility to which he is referred. (This is determined by caller and facility evaluation of referral)*	**i [3] •** *Time spent per referral* **ii [3] •** *Cost per referral*	**i [2] •** *Attributes which contribute to success or failure (categories of problems, quality of resource file, kinds of agencies to which referrals are made)* **ii [2] •** *Recipients demographic characteristics of those receiving referral* **iii [2] •** *Conditions affecting success or failure (I & R center location, auspices, hours open, etc.)* **iv [3]** *Effects on I & R center users, facilities, I & R center*

IMMEDIATE OBJECTIVES – SINGLE I & R CENTER

Statement of Objectives	Criteria for Determining the Attainment of Each Objective				
	Effort	Performance	Adequacy of performance	Efficiency	Process
VI-D (continued) Operate the I & R center:					
3 Provide follow-through services to those callers who received referrals, and to other callers who, in the opinion of the I & R specialist, have need of this service;	i [1] • *Man hours spent in follow-through, including supervision* ii [1] • *Cost of providing follow-through*	[1] • *Number of callers receiving follow-through*	i [1] • *Proportion of those earmarked for follow-through who actually were contacted* ii [1] • *Proportion of those who received follow-through service and had not contacted facility, who then went on to contact facility*	i [1] • *Time spent per follow-through* ii [1] • *Cost per follow-through contact* iii [3] *Alternative methods of follow-through*	i [2] *Attributes which contribute to success or failure* ii [1] • *Recipients — characteristics of those having taken no action (including their reasons); characteristics of those acting after follow-through encouragement and those not acting* iii [1] *Condition: affecting success or failure (time of contact — hour, day, or season; kind of contact, etc.)* iv [3] *Effects on I & R center users, facilities, I & R center*
4 Provide escort services to those who wish to receive escort; these services consist of: a transportation to facility, b a companion to help negotiate initial contact with facilities.	i [1] • *Man hours spent in providing escort service* ii [2] • *Cost of providing escort service*	i [1] • *Number of those contacting center who are offered service* ii [1] • *Number of those contacting center who make use of this service*	i [1] • *Proportion of those offered escort service who accept* ii [1] • *Proportion of those using escort services who receive agency services (as compared with proportion who do not use escort (a) who were not offered it, and (b) who were offered escort and declined)*	i [1] • *Time spent per escort unit* ii [2] • *Cost per escort unit*	i [2] • *Attributes of each aspect of escort service which contribute to success or failure* ii [2] • *Recipients — characteristics of those who do and who do not accept escort service* iii [2] • *Conditions affecting success or failure (I & R center location, auspices, personnel, etc.)* iv [2] *Effects on I & R center users and on I & R center effectiveness*

VI-E **Collect data on callers' needs and demographic characteristics.**	i [4] *Man hours spent in obtaining information and filling out record forms* ii [4] *Cost of collecting data*	i [1] • *Number of caller interview forms completed* ii [1] • *Number of needs identified* iii [1] • *Number of User Surveys returned with usable demographic information*	i [1] • *Completeness of data* ii [4] *Accuracy of data*	i [1] • *Time spent per caller* ii [1] • *Cost per caller* iii [3] *Alternative methods of gathering and recording information on callers' needs*	i [2] • *Attributes of data-recording instruments which contribute to success or failure* ii [2] *Ability of I & R staff to elicit desired information* iii [3] *Characteristics of callers who do and who do not exhibit resistance to reveal certain kinds of information* iv [2] *Conditions affecting success or failure (I & R center auspices, etc.)* v [2] *Effects on I & R center users and on I & R center's public image.*
VI-F **Collect data on callers' service experience, including that with the I & R center.**	i [2] *Man hours spent in data collection.* ii [2] *Cost of data collection:* *(a) staff time* *(b) postage and materials* *(c) phone costs*	i [1] • *Number of User Surveys returned with usable service experience information*	i [2] *Completeness of data* ii [3] *Accuracy of data* iii [1] • *Percent of callers from whom usable data is collected*	i [4] *Cost-return for data collection*	i [2] *Factors contributing to success or failure of collecting such data (e.g., mail-phone)* ii [2] *Demographic descriptions of respondents and non-respondents* iii [3] *Conditions affecting success or failure (e.g., demographics by problem type, etc.)* iv [3] *Unintended effects (e.g., inadvertant service follow-through)*

CHAPTER 5: Research Strategy and Methodology for Evaluating the Demonstration

The evaluation strategy for this demonstration has two goals: to determine whether the specific objectives of the demonstration (as listed in Table III) are achieved and to investigate the effects of certain variables in the delivery of I & R services.

Achievement of Objectives

The first goal is being met by the collection and analysis of data relative to the criteria set forth in Table III. We are unable to obtain measures of all of the criteria listed. Limited time and resources demand that priorities be set; thus, some data that might be of interest have not been gathered. We have attempted to give priority to those criteria that seem to be the best indicators of whether . objective has been achieved.* As a rule, we examine data for each center as well as for the network as a whole. We obtain data for the measurement of criteria in Table III in the following ways:

Demographic Information

(1) We use relevant information concerning population distribution and population characteristics that is available in Census Bureau publications and tapes. We also record information about actual users of the demonstration services on precoded forms; this information is converted to computer-usable data and stored for computer analysis.

**Criteria on which data will be gathered are marked with an asterisk in Table III.*

Progress Reports on Resource File Development

(2) All centers submit periodic progress reports (initially every two weeks, later once a month or less) that reflect the growth of the resource file and provide a vehicle for centers to indicate problems they may be having with various aspects of resource-file development. This reporting form is reproduced on page 54 of the appendix. A second form (page 55 of the appendix) is used to gather retrospective estimates of the costs in time and money involved in developing the resource file.

Center Operations

(3) Much of the information that is used for this evaluation of the demonstration is gathered during the daily operations of the centers through the use of four precoded forms (appendix, pages 57-69). A Caller Interview Form is completed for each person contacting a center for I & R services. This form, when completed, documents the nature of the problems presented and the actions taken by the center in helping each inquirer. In the case of a formal referral to an agency, a Referral Form is completed and a part of it sent to the agency to which the referral is made. The agency is asked to complete the form concerning the outcome of the referral from the agency's perspective, and to return it to the center. In addition to these forms, all workers in the network report regularly the amount of time spent in various activities on an I & R Worker Report. Cost data are obtained from a Grant Expenditures Report, which is submitted on a monthly basis by each center.

User Satisfaction and User Characteristics

(4) Persons contacting a center are asked permission for a follow-up survey. An I & R User Survey form (page 71 of the appendix) is mailed to every inquirer who gives his permission (the survey may also be administered over the telephone in some cases). This form is used to record the user's experience with the I & R center as well as his behavior with respect to information given him by the center. As mentioned above, the User Survey is also used to record demographic information about people calling the centers. Initially all callers are asked to participate in this research follow-up. If volume makes it necessary to restrict follow-up to a sample of callers later in the demonstration, we will attempt to continue research follow-up on all callers 60 years of age or older and inquiries on behalf of that age group, and on a simple random sample of all other callers.

Additional Methods of Data Collection

(5) Background training and work experience, paid or volunteer status, and wage information are obtained for each worker in the network with a Biographical Summary Sheet (page 64 in the appendix). All centers monitor public media and report any items about individual centers or about the network

that come to their attention. Each item is filed according to its content and when and where it appeared. On page 70 of the appendix is a reproduction of a form for reporting publicity items. Center personnel have evaluated the training sessions that they have attended. Structured interviews have been administered to all personnel associated with the demonstration to elicit their judgments about the process and progress of the program (see page 95 of the appendix).

Differential Effects of Some Variables

This demonstration may be conceived of as a "quasi" field experiment. In any social experiment, and especially one of this magnitude, control over and, indeed, knowledge of all of the effective variables operating is necessarily incomplete. Randomly drawn treatment and control groups are not available. Nor is simple matching an acceptable alternative, given the relatively few centers we are working with and the ostensibly important differences among them.*

Nevertheless, we anticipate that, by observing centers that we have selected according to certain variables and by the manipulation of certain other variables in the centers, at certain points during the demonstration we will have comparable situations. These may allow us to determine the effects of some variables using statistical estimators and statistical tests when they are appropriate. Those variables that we will examine include: escort, outreach, and follow-through services offered by I & R centers in addition to basic I & R; use of volunteers and nonprofessionals to deliver I & R; publicity directed to the elderly persons in the community; and the location of the I & R center in different settings.

Addition of Service Components

The basic purpose of an I & R center is to improve the access of persons to social services, and this is one of the ultimate objectives of each center in the network (Table III, objective IV-A). The minimal effort necessary to do this involves talking to each person who contacts the center, identifying the problems he has and the services needed to help him, and using the center's resource file to give him information about any agencies or facilities that provide the needed service (objective VI-D-1). Several additional functions have been identified that might be appropriate services of

---

**It has been persuasively argued by Paul E. Meehl [1970] that it is inadvisable even to consider matching groups in social science experiments and demonstrations of this sort.*

an I & R center and that might enhance the effectiveness of a center in achieving the ultimate objective stated above. These are:

(1) *Formal referral*; that is, an appointment made by the I & R center for a caller to talk with a particular worker at the facility to which the caller is referred (Table III, objective VI-D-2);

(2) *Follow-through* to offer further help if needed to callers who receive either formal referral or informal steering to facilities (objective VI-D-3);

(3) *Escort* to facilities that may provide the services needed by a caller; escort may include transportation and/or a companion to help the person negotiate initial contact with the facility (objective VI-D-4);

(4) *Outreach*; that is, door-to-door canvassing of areas known to have higher proportions of elderly persons to inform them of the existence of the I & R center and its potential usefulness and to offer information and referral services on the spot if requested (objective V-B-1);

For each of these additional service components we may ask:

(a) Does this activity increase the likelihood that persons who come into contact with the I & R center will act on the information given them by the center?

(b) Does this additional effort on the part of the I & R center increase the likelihood that users will get the services that they need?

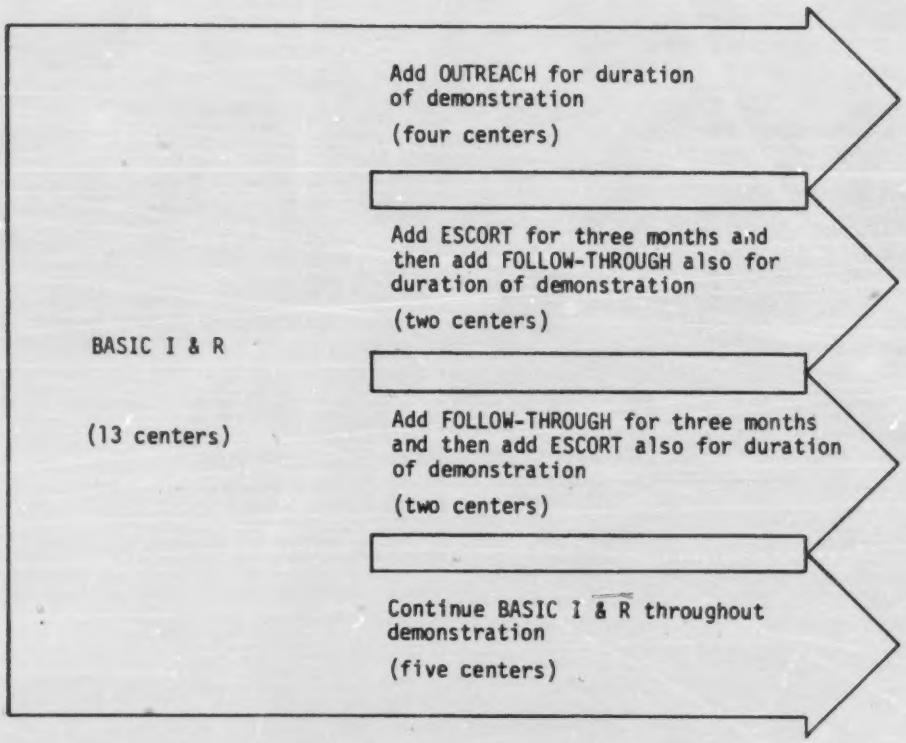
(c) Does this effort result in any identifiable subgroup of the population (especially the elderly) being more likely to make contact with service providers?

(d) What amounts of time and money are necessary to implement this additional component?

All centers offer to make formal referrals for callers to whom information is given about a specific facility. We observe the effects of these formal referrals using callers who do and do not receive such referrals. We also are studying the effects of adding follow-through, escort, and outreach as service components offered by I & R centers by introducing these services into some network centers after they have been operating for a time, while the rest of the centers continue to provide basic I & R services only. The scheme for introducing these service components at certain centers is diagrammed in Figure 1. Some identifying information about the network centers is shown in Figure 2.

We are now comparing the effects of these variables within each center and among all centers. Data on time and costs of operations, persons served, and users' service experiences and evaluations are being examined in each center before and after a service component is added. To provide some control for the effects of experience and community reputation gained over time, those centers that have added service components are being compared with the five centers that have not.

FIGURE 1: Scheme for program implementation in the network

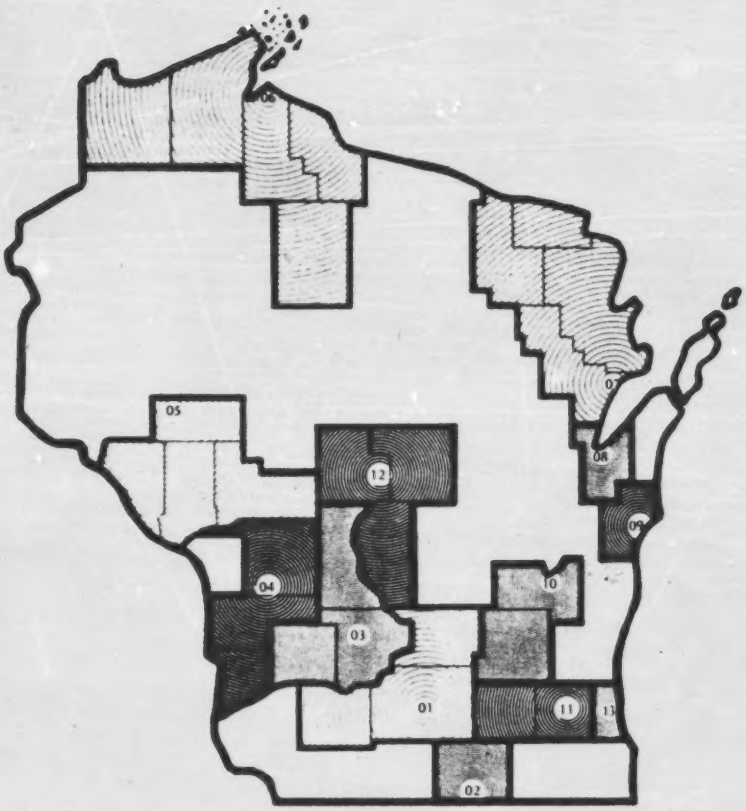

Add OUTREACH for duration of demonstration
(four centers)
Add ESCORT for three months and then add FOLLOW-THROUGH also for duration of demonstration
(two centers)
BASIC I & R
(13 centers)
Add FOLLOW-THROUGH for three months and then add ESCORT also for duration of demonstration
(two centers)
Continue BASIC I & R throughout demonstration
(five centers)

*Use of Volunteers and Nonprofessionals**

One of the objectives of this demonstration is to promote the use of volunteer and nonprofessional personnel* in the centers (objective III-B). To date, there apparently has been no research bearing on the capability of these categories of personnel to deliver I & R services. It is the intent of this evaluation to assess the extent to which these personnel are actually employed in the centers and to investigate the effectiveness with which they function

As noted in the previous chapter, individuals with a variety of educational and employment backgrounds were hired to deliver I & R services. These backgrounds have been taken into account in assigning staff to professional and nonprofessional categories for the purpose of data analysis. It should be kept in mind that the experience of participating in the WIS demonstration contributes to the development of professional skills in the delivery of I & R services. The categorization "professional/nonprofessional" is meaningful only at the point of entry into the manpower pool.

FIGURE 2: The Wisconsin Information Service Network



01 **Wisconsin Information Service**
Located in Social Security Administration Office
Madison
Serving Dane, Columbia, and Iowa Counties
608 233 1314

02 **Rock Information Service**
Information and Referral Service for All Human Needs
Beloit
Serving Rock County
608 364 4486

03 **Information and Referral Service**
Counseling Center
Reedsburg
Serving Juneau, Richland, and Sauk Counties
608 524 4359

04 **Cashton I & R Center**
Cashton
Serving Crawford, Monroe, and Vernon Counties
608 386 5111

05 **Western Dairyland Information & Referral Center**
Eau Claire
Serving Buffalo, Eau Claire, Jackson,
and Trempealeau Counties
715 834 8781

06 **Wisconsin Information Service**
Northwest Wisconsin Community Action Program
Ashland
Serving Ashland, Bayfield, Douglas, Iron,
and Price Counties
715 682 8175
(Direct line from Superior to Ashland 392 6169)

07 **Wisconsin Information Service**
Northeast Wisconsin Community Action Agency
Oconto
Serving Florence, Forest, Marinette,
and Oconto Counties
414 834 4877

08 **Wisconsin Information Service**
United Community Council of Brown County
Green Bay
Serving Brown County
414 432 2991

09 **Manitowoc Advisory and Referral Service**
Manitowoc
Serving Manitowoc County
414 682 8215

10 **Wisconsin Information Service**
Located in Social Security Administration Office
Fond du Lac
Serving Fond du Lac and Dodge Counties
414 923 1170

11 **Wisconsin Information Service**
Located in Social Security Administration Office
Waukesha
Serving Waukesha and Jefferson Counties
414 547 6770

12 **Wisconsin Information Service**
Located in Social Security Administration Office
Wisconsin Rapids
Serving Wood, Portage, and Adams Counties
715 421 1050

13 **Milwaukee Component of Wisconsin Information Service**
Washington Park Information Service for the Aging
and
Project Involve Central Administration
Milwaukee
Serving Milwaukee County
414 933 6540

in the delivery of I & R services. The Biographical Summary Sheet provides such information as paid/volunteer status, educational experience, and years of work experience for each worker in the network. Using a unique identification code for each worker we are able to get cross-tabulations for professional, nonprofessional, and volunteer staff from Worker Reports and Caller Interview Forms and, through the unique Caller Interview Form numbers, from Referral Results and User Surveys. We are then able to determine how a volunteer or a nonprofessional spends his time, what sorts of caller inquiries he handles and how well he handles them by users' evaluations, the extent to which local professional consultants are used (objective VI-C), and the effects of using these personnel.

Publicity Directed to the Elderly

Publicity is an important factor in letting the general public know of the existence of the network and of individual centers (objective V-B-2). Although all of the centers advertise to and serve the general public, seven centers are experimenting with the emphases of their publicity. They are making special efforts to advertise in places where the elderly are more likely to see such advertisements (e.g., senior centers), and are using publicity materials which should have particular appeal to the elderly. The proportions of elderly persons served by those centers are being monitored to determine whether such a publicity emphasis is a useful means of reaching more persons in that target group.

Location of Centers in Different Settings

Locating centers to increase their use by specific segments of the population is another objective of the demonstration (objective V-B-3). We are particularly interested in the effects of different kinds of affiliations with sponsoring agencies and whether the distance of the center from the population it serves affects the use of the center. All of the centers are identified with the statewide Wisconsin Information Service network, and each has its own separate telephone listing (see Figure 2 on the opposite page). The centers are, however, affliated with different kinds of sponsoring agencies, and they are located in a variety of physical settings (see the listing on top of the next page). Some of the centers are located in relatively rural areas, while others are in urban locations; and some serve multi-county areas, while others restrict their area to a single county. The facilities listed in each center's resource file are assigned geocodes* to permit analysis of use of

**The Geographic Identification Code Scheme of the Bureau of the Census is used.*

Sponsoring agencies	Physical locations of centers
Mental health counseling center	One located in the sponsoring agency
Department of social services	One located in the sponsoring agency
Community action agencies	Two located in the sponsoring agency
	One located in a senior craftshop
	One located in a park and recreation building in which is also located a drop-in center for seniors
Committee on aging	One located in a senior center
United community council	One located in an annex with county offices
Social Security Administration	Four located in Social Security offices
United community services and a commission on social relations-social development (joint sponsorship)	One with four branch locations: a senior center and in three neighborhood walk-in service centers

facilities by distance from the center; the addresses of callers are translated into geocodes whenever possible to determine frequency of usage by callers located at various distances from the center and in different population density areas. In addition, proportions of long-distance telephone calls received (which are advertised as being free-of-charge to the caller) give some information about distances of users from the centers. We are especially interested in determing whether demographic characteristics of users (obtained from User Surveys) and the sorts of problems presented by them (obtained from Caller Interview Forms) vary with a center's agency affiliation, its physical location (e.g., in a senior center), and/or its geographic location with respect to the population it serves.

Special Features of the Forms Used in This Demonstration

The Caller Interview Form has a separable page for recording a caller's name, address, and/or telephone number when these are necessary for mailing a referral reminder or a User Survey, or for recontacting the caller to transmit other information. The address, when present, is also used to record geocode information for keypunching. The section with the name, address, and telephone number is detached and destroyed when the I & R service is completed and only the precoded portion of the form is retained for analysis. Thus the confidentiality of the caller is protected with regard to the data collected about him.

A unique number preprinted on the coded portion of each Caller Interview Form and copied onto the Referral Form or User Survey for a given caller permits cross-tabluations of data from these three sources. Cross-tabulations of

data for a given worker in the network are possible through use of that worker's unique four-digit code; the first two numbers are a center identification code, and the last two numbers are unique for a worker within that center. This unique worker code appears on the Caller Interview Form, the Biographical Summary Sheet, and the Worker Report forms.

CHAPTER 6: Reporting Results of the Evaluation of the Wisconsin Demonstration

It is obvious that a tremendous amount of data is being generated and collected during the course of this demonstration. Much thought has been given to the problem of presenting the information gathered in such a way that it can be easily retrieved and used by persons interested in the outcome of the project. Many interim reports are being generated for in-house use; these reports include monthly reports for each center on its progress and on the progress of the network as a whole (see the appendix for sample copies of first-generation reports of this kind), progress reports covering intervals of several months, and special reports on specific aspects of the demonstration when these are required.

The findings from the demonstration will be published in a series of reports to accompany the operational manuals developed for and refined during the demonstration. This allows us to present the data in more manageable units, makes it easier to retrieve information about the outcome of specific phases and components of the demonstration, and makes it possible to present more of the data and evaluation results in final reports before the demonstration is actually ended. The following manuals and research reports are planned for publication at the end of the project:

Operational Manual	Research Report
Notes for Managers	Development of a statewide network of I & R centers -- including a history of the demonstration, the complete matrix of objectives and criteria, and an overview of the evaluation strategy. Readers would be referred to the reports below whenever appropriate.
A Training Syllabus	Evaluation of training--including evaluations by trainees of formal training sessions and informal, on-the-job training.
The Resource File	Evaluation of resource file development--including data from periodic reports on resource file development, time and cost data, use of volunteers, etc.
Information-Giving and Referral	Analysis of the delivery of basic I & R services in the network--including analysis of such things as problems presented, volume of users, populations being served, referral results, and users' evaluations of the centers. Much of the information for this report will have been cumulated in monthly and quarterly feedback reports to the centers.
Volunteer Escort Services	Evaluation of escort service as an added function of an I & R center.
Follow-Through	Evaluation of follow-through as an added function of an I & R center.
Reaching Out	Evaluation of outreach as an added function of an I & R center.
(Special reports)	Report on how an I & R center can improve its service to the elderly. An analysis of variables which are associated with improved services to the elderly in the areas covered. Evaluation of the usefulness to planners of data gathered through a statewide network of I & R centers.

This series of reports will be condensed and presented in a summary final report. A tentative table of contents for that report is given in Figure 3.

FIGURE 3: Tentative table of contents of Information and Referral Center Study final report

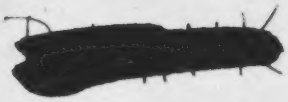
PART I: Program Overview and Description
- Chapter 1: Introduction
  - History of Project
  - Basic Findings
  - Demonstration Phase
- Chapter 2: Program Objectives and Assumptions
- Chapter 3: Site Selection
- Chapter 4: Staffing Patterns

PART II: Program Administration
- Chapter 5: Training
- Chapter 6: Program Inputs--Effort and Cost
- Chapter 7: Publicity
- Chapter 8: Community Relations
- Chapter 9: Program Monitoring

PART III: Program Operations
- Chapter 10: The Resource File
- Chapter 11: Center Users
- Chapter 12: Service Process
- Chapter 13: Service Outcome

PART IV: Program Variations
- Chapter 14: Program Variation Outcomes

PART V: Data Collection and Reports
- Chapter 15: Data and Reporting Methods
- Chapter 16: Reports and Report Utilization



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APPENDIX: Forms and Reports Used in the Wisconsin Information System

This appendix contains three different kinds of exhibits. First, from pages 54 to 72, we have reproduced various forms used by the Wisconsin Information Service in its operations and by us in our evaluation of the WIS network. Second, we have reproduced sample reports from October 1973 (pages 73 to 94). And last, we have included a copy of the interview used in our evaluation; the reproduction here has been compressed to eliminate the space allowed for responses, and the page numbers on which each set of questions occur in the original are given in the page heading. All exhibits in the appendix have been reduced slightly in size for their presentation here. A complete listing is given in the table of contents, page vi.

Summary Of Resource File Development As Of:

Covering Period:

Date Report Complied _____

Center _____ (_____) Manager _____
Center Number

_____ Total number of Cross Reference File Cards filled out to date. (Do not count AKA's)

_____ Total number of resources with which initial contact (as part of the process leading up to an interview) has been made to date.

_____ Total number of interviews completed to date.

_____ Total number of Facility File Forms completed to date.

_____ Total number of Problem/Service Code Cards to date.

Have you made any attempt to recruit volunteer help? No

Yes: _____Total number of volunteers utilized during this reporting period.

_____Total number of volunteer hours contributed during this reporting period.

List sources of volunteer help which has been utilized during this period:

_____ _____

_____ _____

Any special problems with or comments on the following (use back of page if necessary):

a. Identification of resources:

b. Contacting resources:

c. Interviewing facilities:

d. Transcribing information to
- Facility File Forms:

- Problem/Service Code Cards:

- Master SEARCH booklet:

e. Verifying information with facilities:

f. Recruiting volunteer help:

g. Training volunteers:

h. Use of volunteers
(1) To identify resources:

(2) To make telephone arrangements for interviews:

(3) To interview facilities:

(4) To transcribe information to
- Facility File Forms:

- Problem/Service Code Cards:

- Master SEARCH booklet:

(5) For other work (specify):

i. Other problems or comments:

Center Number _____

Center Manager _____

Resource File Development
Time Breakdown Sheet

In order to analyze the time it takes to complete a Resource File, we are asking each center to fill out the following information. We are concerned here only with the time you have spent working on the development of the I & R center Resource File. Please estimate as accurately as possible. If necessary, round off time estimates to the nearest half hour.

1. How long did it take to prepare the Cross Reference File Cards?

   _____(Estimate total number of man hours)

2. What documentary resources were used for your Cross Reference File? (If any directories were used, list each one singly. Use extra pages if necessary.)

3. Estimate on a <u>per facility</u> basis:

   a) Phone and clerical time to arrange an appointment _____

   b) Travel and interviewing time (including delays, etc.) for:

      (1) large multiprogram facilities _____

      (2) smaller, more single-purpose facilities _____

      (3) very small clubs, churches, etc. _____

4. Estimate average time per inventory booklet:

   a) to check over booklet and reassign new entries _____

   b) to transcribe the A & C sections _____

   c) to transcribe the B section _____

      (1) large facilities _____

      (2) small facilities _____

Page 2

5. How long did it take to prepare Problem/Service Code Cards (i.e., enter facility numbers and make up new code cards when necessary)?

   a) initially _____ (hours) per _____ (number of facilities)

   b) After several inventories have been completed _____ (hours) per _____ (number of facilities)

6. Describe the method(s) in preparing code cards at your facility. (Use extra pages if necessary.)

7. How long did the verification process take per facility:

   a) preparing material to send for verification _____

   b) follow-up to get verification materials returned _____

8. What was the average cost per facility for the verification process (copying, postage, etc.)

9. How long did it take to prepare the master SEARCH Booklet? _____

CALLER INTERVIEW FORM

A Caller's name: _____ Phone ____ – ____
(Area Code, Number)

Address: _____ _____
(Street, Town)

_____ _____
(City, State, Zip Code, County)

If caller is acting on the behalf of someone else who is the actual client, be sure to obtain the client's name and address also:

Is caller same as client? ☐ Yes ☐ No (If no, fill in client's name and address below)

Client's name: _____ Phone ____ – ____
(Area Code, Number)

Address: _____ _____
(Street, Town)

_____ _____
(City, State, Zip Code, County)

Is client's address: ☐ Permanent ☐ Temporary

I & R User Survey to be mailed? ☐ No ☐ Yes _____ (date)

Referral Form mailed? ☐ No ☐ Yes _____ (date)

B **Problems Presented** (Use for notes)
(Be sure to list in Section D the code numbers for Problem/Service Intersections identified.)

Previous or present facility contacts, if relevant:

Facility (if applicable)	Name of Contact	Phone

Do not write below this line.

Research Follow-up:

Dates of telephone contacts/notes:

Research Aide: _____

All forms completed? ☐ No ☐ Yes

If no, explain: _____

_____

_____

_____

_____

_____

_____

Date sent to keypuncher: _____

CALLER INTERVIEW FORM

CARD/FORM IDENTIFICATION 1 [1] 2-3 [0 1]

FORM NUMBER 4-10 [0][ ][ ][ ][ ][ ]

KEYPUNCH OPERATOR ☒ = 1

C

1 Day: 11 ☐
1 = Monday 4 = Thursday
2 = Tuesday 5 = Friday 7 = Sunday
3 = Wednesday 6 = Saturday

2 Date: 12-17 [ ][ ] / [ ][ ] / [ ][ ] (mo. / day / year)

3 Time: 18-21 [ ][ ][ ][ ] 22 ☐ a.m. 23 ☐ p.m.

4 Initial contact by: 24 ☐
1 = Phone 4 = Outreach
2 = Mail 5 = Answering service
3 = Walk-in 6 = Other (specify) _____

5 If by phone: 25 ☐
1 = Local 2 = Long distance

6 Geocode (Leave blank): 35-71

State	County	M C D	Place	Tract Basic	Tract Suf	Congr Dist	Enumeration District (Basic)	Urbanized Area	S M S A	Zip Code
[ ][ ]	[ ][ ][ ]	[ ][ ][ ][ ]	[ ][ ][ ][ ]	[ ][ ][ ][ ]	[ ]	[ ][ ]	[ ][ ][ ][ ]	[ ][ ][ ][ ]	[ ][ ][ ][ ]	[ ][ ][ ][ ][ ]

7 Private individual? 1 = Yes 2 = No 26 ☐
For whom?
1 = For self 2 = For someone else 27 ☐

8 Facility? 28 ☐
1 = No
If yes, for:
2 = An individual 4 = Other reason (specify) _____
3 = Information for the facility 5 = Escort/transportation only
Facility name: _____
Facility number: (Leave blank) 29-34 [ ][ ][ ][ ][ ][ ]

→ CARD 2

D

P/S Codes (List separately)	Facility Numbers (List separately)	Action(s) Taken (Mark boxes appropriately) I[a]	R[b]	F[c]	E[d]	T[d]	None[e] (Explain)	Notes
11-16 [ ][ ]-[ ][ ]-[ ][ ]	17-22 [ ][ ]-[ ][ ][ ][ ]	23☐	24☐	25☐	26☐	27☐	28☐	_____
29-34 [ ][ ]-[ ][ ]-[ ][ ]	35-40 [ ][ ]-[ ][ ][ ][ ]	41☐	42☐	43☐	44☐	45☐	46☐	_____
47-52 [ ][ ]-[ ][ ]-[ ][ ]	53-58 [ ][ ]-[ ][ ][ ][ ]	59☐	60☐	61☐	62☐	63☐	64☐	_____

→ CARD 3

11-16 [ ][ ]-[ ][ ]-[ ][ ]	17-22 [ ][ ]-[ ][ ][ ][ ]	23☐	24☐	25☐	26☐	27☐	28☐	_____
29-34 [ ][ ]-[ ][ ]-[ ][ ]	35-40 [ ][ ]-[ ][ ][ ][ ]	41☐	42☐	43☐	44☐	45☐	46☐	_____
47-52 [ ][ ]-[ ][ ]-[ ][ ]	53-58 [ ][ ]-[ ][ ][ ][ ]	59☐	60☐	61☐	62☐	63☐	64☐	_____

→ CARD 4

11-16 [ ][ ]-[ ][ ]-[ ][ ]	17-22 [ ][ ]-[ ][ ][ ][ ]	23☐	24☐	25☐	26☐	27☐	28☐	_____
29-34 [ ][ ]-[ ][ ]-[ ][ ]	35-40 [ ][ ]-[ ][ ][ ][ ]	41☐	42☐	43☐	44☐	45☐	46☐	_____

(Leave blank)
47 ☐ All blank
48 ☐ Numeric codes
49 ☐ Verbal notes

(Leave blank)
50 ☐ All blank
51 ☐ Numeric codes
52 ☐ Verbal notes

[a] I = Information only or informal referral
[b] R = Formal referral – Attach Referral Form
[c] F = Follow-through
[d] E = Escort, T = Transportation – Attach Escort/Transportation Form
[e] None = No I & R service provided

(Leave blank)
53 ☐ All blank
54 ☐ Verbal notes

E **I & R Services Provided** 55 ☐

0 = No answer
1 = Request inappropriate (explain in section G)
2 = Handled in initial contact (go to section H)
3 = More than one contact (go to section F)
4 = Brief PR contact, no service
5 = Extended interview, no service
6 = Extended interview, service given
7 = Other (explain in section G)
8 = FT contact made, person got in touch with facility
9 = FT contact made, person did not get in touch

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rev 10/73

F **If more than one contact** with or about the caller was necessary to provide service, complete this section.

Record numbers from the list below to describe, in order, successive contacts with or about the caller. (The first contact has already been recorded in Section A.)

56-57 ☐☐ second 58-59 ☐☐ third 60-61 ☐☐ fourth 62-63 ☐☐ fifth 64-65 ☐☐ sixth 66-67 ☐☐ seventh 68-69 ☐☐ eighth 70-71 ☐☐ ninth 72-73 ☐☐ tenth

Check here if more than ten 74 ☐

10 = Answering service call back

Center contacted another facility:
- **20** = To arrange referral appointment
- **21** = To obtain information for caller
- **22** = Other (specify) _____

30 = Center arranged contact by another facility
- Name _____
- Reason _____

Center contacted consultant:
- **40** = To obtain information for caller
- **41** = For advice on how to help caller
- **42** = Other (specify) _____

Center contacted caller again:
- **50** = To obtain further information from caller
- **51** = To provide information about caller's request
- **52** = To confirm referral appointment
- **53** = Other (specify) _____
- **54** = No further assistance from center on follow-through
- **55** = Center gave further assistance

Caller contacted center again
- **60** = To give more information
- **61** = To check on progress of case
- **62** = Other (specify) _____

70 = Center contacted state office

80 = Other forms of contact (specify) _____

81 = Outreach worker contacted center

G **Additional remarks or notes:**

→ CARD 5

H **Permission for I & R User Survey**

During final contact, ask the caller (except in the case of a facility calling for general information) if he would mind if he were contacted again by mail or phone to answer a few brief questions about the service he received from the I & R center. Explain that these questions will help the center to improve its service to the public.

Did caller agree to follow-up? 1 = Yes 2 = No 11 ☐

I **Summary Section** (To be filled out by interviewer after final contact)

1 Time necessary to take care of this caller (Be as accurate as possible): 12-13 ☐☐ hours 14-15 ☐☐ min

2 Number of days from first to final contact (Count day of first contact as day 1): 16-17 ☐☐

3 Do you feel that an appropriate service was found for this caller's needs or that he received the appropriate information?
1 = Yes, fully 2 = Yes, partially 3 = No 18 ☐

4 What do you feel was the role of the I & R center in this instance? (Check those which apply)
- 19 ☐ Help caller clarify problem
- 20 ☐ Verify what the caller already knew
- 21 ☐ Give information only about facilities and services
- 22 ☐ Encourage a caller who was reluctant or unsure about seeking a service
- 23 ☐ Make a formal referral
- 24 ☐ Arrange for contact by another facility or person
- 25 ☐ Give information about a factual issue other than facility services, eligibility, or procedures
- 26 ☐ Act as mediator between caller and another facility
- 27 ☐ Give reassurance to caller
- 28 ☐ Call inappropriate for I & R service – Explain in Section G.

5 Which of the above was the most important role in this case? (Use column number at left of box.) 29-30 ☐☐

6 Interviewer: _____ name

Interviewer's code: 31-34 ☐☐-☐☐ center code / interviewer number

More than one interviewer? 1 = Yes 2 = No 35 ☐

REFERRAL FORM

CALLER'S COPY

Wisconsin Information Service

To: _____

Address: _____

_____

This is a reminder
of your appointment at _____ (Name of Facility) with _____ (Person)

Address: _____ on _____ (Day of Week),

_____ _____ (Date)

Phone: _____ at _____ (Time) ☐ a.m. ☐ p.m.

Name of interviewer who made referral: _____

_____
Wisconsin Information Service

Reason(s) for referral:

A _____

B _____

C _____

D _____

Other: _____

REFERRAL FORM

CENTER COPY

Name: _____

Address: _____

_____

Do not write in this space.

Date: _____

Referral was made to _____ (Name of Facility)

_____ (Facility Worker)

Address: _____

for _____ (Day of Week),

_____

_____ (Date)

Phone: _____

at _____ (Time) ☐ a.m. ☐ p.m.

Name of interviewer who made referral: _____

_____ (Wisconsin Information Service)

FORM NUMBER ☐☐☐☐☐☐

FACILITY NUMBER ☐☐-☐☐☐

Reason(s) for referral:

☐☐-☐☐-☐☐ **A** _____

☐☐-☐☐-☐☐ **B** _____

☐☐-☐☐-☐☐ **C** _____

☐☐-☐☐-☐☐ **D** _____

Other: _____

REFERRAL FORM

FACILITY COPY

Name: _____

Address: _____

_____

This person has been referred to your facility for service. Please complete the card below and return it to our office as soon as possible after the appointment date. The information will be used to improve our referrals to your facility and others in the area. Thank you.

Date: _____

has an appointment at _____ with _____

_____ for _____,

_____ _____

Phone: _____ at _____ ☐ a.m. ☐ p.m.

Name of interviewer who made referral: _____

Please complete the form below, detach and return. _____ Wisconsin Information Service

REFERRAL RESULT

CARD 1 [1] 2-3 [0][2] FORM NUMBER 4-10 [ ][ ][ ][ ][ ][ ][ ]

FACILITY NUMBER 11-16 [ ][ ] – [ ][ ][ ][ ]

Reason(s) for referral:

17-22 [ ][ ] – [ ][ ] – [ ][ ] **A** _____

23-28 [ ][ ] – [ ][ ] – [ ][ ] **B** _____

29-34 [ ][ ] – [ ][ ] – [ ][ ] **C** _____

35-40 [ ][ ] – [ ][ ] – [ ][ ] **D** _____

Other: _____

1 Did this person keep his appointment?
41 ☐ Yes 42 ☐ No

2 If not, did your facility follow through in any way?
43 ☐ Yes 44 ☐ No

3 Was this referral to your facility appropriate?
45 ☐ Yes 46 ☐ No – Please explain briefly:

4 Did your facility send this person elsewhere for any of the problems listed above? If yes, for which problems (check letters)?

47 ☐ **A** 49 ☐ **C** 51 ☐ Other
48 ☐ **B** 50 ☐ **D**

Signature: _____ Date: _____

5 Because of this referral, has this person received or is he receiving service by your facility for the problem(s) indicated?
52 ☐ Yes – All 53 ☐ Yes – Some 54 ☐ No

Check those problems not being serviced:

55 ☐ **A** 57 ☐ **C** 59 ☐ Other
56 ☐ **B** 58 ☐ **D**

Please explain briefly:

6 Because of this referral, has this person received or is he receiving service by your facility for a different problem or problems?
60 ☐ No 61 ☐ Yes – Please explain briefly:

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REMOVE BACKING • PRESS IN PLACE
KLEEN STIK PRODS • NEWARK, N. J. 07114
"D" TRANSFER TAPE

BIOGRAPHICAL SUMMARY SHEET

1 [1] 2-3 [0][4]

1. Interviewer's code: 4-7 [ ][ ] - [ ][ ]

2. Educational level:
   8 [ ] No formal education
   9 [ ] Some elementary school (1-7 years)
   10 [ ] Completed elementary school (8 years)
   11 [ ] Some high school (9-11 years)
   12 [ ] Completed high school (12 years)
   13 [ ] Some college (13-15 years)
   14 [ ] Completed college (16 years)
   15 [ ] Post-graduate education (17+ years)

2a. Highest degree earned:
   16 [ ] B.A.
   17 [ ] M.A.
   18 [ ] M.S.
   19 [ ] M.S.W.
   20 [ ] R.N.
   21 [ ] Ph.D.
   22 [ ] Other (specify)_____

2b. Major field (for highest degree):
   23 [ ] Sociology
   24 [ ] Social Work
   25 [ ] Psychology
   26 [ ] Counseling
   27 [ ] Nursing
   28 [ ] Gerontology
   29 [ ] Education
   30 [ ] Other (specify)_____

3. Years of work experience:

	"Helping Profession" (teaching, counseling, etc.)	Other Work Experience
Less than 1 year	31 [ ]	36 [ ]
1-2 years	32 [ ]	37 [ ]
3-5 years	33 [ ]	38 [ ]
6-10 years	34 [ ]	39 [ ]
More than 10 years	35 [ ]	40 [ ]

4. Type of staff:
   41 [ ] Volunteer
   42 [ ] Paid

5. Sex:
   47 [ ] Male
   48 [ ] Female

6. Date of Birth:
   49-54 [ ][ ] [ ][ ] [ ][ ]

For office use only (leave blank): 43-46 [ ][ ][ ]

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ESCORT AND TRANSPORTATION SERVICE OF THE Wisconsin Information Service

Card 1 [1] 2-3 [0][6]

Reimbursement Ticket

Caller's Name _____ Phone _____ Date _____

Address Pickup _____

_____

Address Return (if different) _____

_____

Caller Interview Form Number 4-10 [ ][ ][ ][ ][ ][ ][ ]

Check here if caller not at home 11 [ ]

Appointment at _____ With _____
Name of Facility Person

(Number) 12-17 [ ][ ]-[ ][ ][ ][ ] On _____
Day of Week

Address _____ 18-23 [ ][ ]-[ ][ ]-[ ][ ]
Date of Appointment

_____

Phone _____ At _____ 24 [ ] a.m. 25 [ ] p.m.
Time

Time Returned _____ a.m. _____ p.m.

Time Left _____ a.m. _____ p.m.

Total Time 26-29 [ ][ ]-[ ][ ]
Hours Min.

Total Mileage Claimed 30-32 [ ][ ][ ] $ _____.

Other Expenses Claimed $ _____.

Total Expenses Claimed 33-36 $ [ ].[ ][ ]

I state that this account of escort and tramporation services is correct and true, and that the expenses claimed are actual and necessary in the provision of this service.

Name _____

_____
Signature

Worker Code 37-40 [ ][ ]-[ ][ ]

ESCORT AND TRANSPORTATION SERVICE OF THE Wisconsin Information Service

Card 1 [1] 2-3 [0 6]

Reimbursement Ticket

Caller's Name _____ Phone _____ Date _____

Address Pickup _____

_____

Address Return (if different) _____

_____

Caller Interview Form Number 4-10 [ ][ ][ ][ ][ ][ ][ ]

Check here if caller not at home 11 [ ]

Appointment at _____ With _____
Name of Facility Person

(Number) 12-17 [ ][ ]-[ ][ ][ ][ ] On _____
Day of Week

Address _____ 18-23 [ ][ ]-[ ][ ]-[ ][ ]
Date of Appointment

_____

Phone _____

Time Returned _____ a.m. _____ p.m. At _____ 24 [ ] a.m. 25 [ ] p.m.
Time

Time Left _____ a.m. _____ p.m.

Total Time 26-29 [ ][ ]-[ ][ ] Total Mileage Claimed 30-32 [ ][ ][ ] $ _____.
Hours Min.

Other Expenses Claimed $ _____.

I state that this account of escort and transporation services is correct and true, and that the expenses claimed are actual and necessary in the provision of this service.

Total Expenses Claimed 33-36 $ [ ][ ].[ ][ ]

Name _____

_____ Worker Code 37-40 [ ][ ]-[ ][ ] CENTER COPY
Signature

ESCORT AND TRANSPORTATION SERVICE OF THE Wisconsin Information Service

Card 1 [1] 2-3 [0 6]

Reimbursement Ticket

Caller's Name _____ Phone _____ Date _____

Address Pickup _____

_____

Address Return (if different) _____

_____

Caller Interview Form Number 4-10 [ ][ ][ ][ ][ ][ ][ ]

Check here if caller not at home 11 [ ]

Appointment at _____ With _____
Name of Facility Person

(Number) 12-17 [ ][ ]-[ ][ ][ ][ ] On _____
Day of Week

Address _____ 18-23 [ ][ ]-[ ][ ]-[ ][ ]
Date of Appointment

_____

Phone _____

Time Returned _____ a.m. _____ p.m. At _____ 24 [ ] a.m. 25 [ ] p.m.
Time

Time Left _____ a.m. _____ p.m.

Total Time 26-29 [ ][ ]-[ ][ ] Total Mileage Claimed 30-32 [ ][ ][ ] $ _____.
Hours Min.

Other Expenses Claimed $ _____.

I state that this account of escort and transporation services is correct and true, and that the expenses claimed are actual and necessary in the provision of this service.

Total Expenses Claimed 33-36 $ [ ][ ].[ ][ ]

Name _____

_____ Worker Code 37-40 [ ][ ]-[ ][ ] WORKER COPY
Signature

I & R WORKER REPORT

CARD/FORM IDENTIFICATION 1 [1] 2-3 [0 3]

Date: 8-13 [ ][ ]/[ ][ ]/[ ][ ] (mo / day / yr)

Interviewer Code: 4-7 [ ][ ]-[ ][ ]

Time period covered by report:

From: 14-19 [ ][ ]/[ ][ ]/[ ][ ] (mo / day / yr) to: 20-25 [ ][ ]/[ ][ ]/[ ][ ] (mo / day / yr)

Number of days center open in period: 26-28 [ ][ ]

signature

FUNCTIONS	PERCENT OF TIME (Include associated travel time) Week 1	Week 2
A. Service		
1. Information and referral	29-30 [ ][ ]	31-32 [ ][ ]
2. Escort		
a. Arrange	33-34 [ ][ ]	35-36 [ ][ ]
b. Provide transport only	37-38 [ ][ ]	39-40 [ ][ ]
c. Provide companion only	41-42 [ ][ ]	43-44 [ ][ ]
d. Provide both transport and companion	45-46 [ ][ ]	47-48 [ ][ ]
3. Follow-through	49-50 [ ][ ]	51-52 [ ][ ]
4. Outreach	53-54 [ ][ ]	55-56 [ ][ ]
B. Clerical (excluding Resource File)	57-58 [ ][ ]	59-60 [ ][ ]
C. Management		
1. Office, fiscal, and personnel administration		
a. Staff recruitment (including volunteers)	61-62 [ ][ ]	63-64 [ ][ ]
b. Budget preparation and obtaining funds	65-66 [ ][ ]	67-68 [ ][ ]
c. Policy formulation	69-70 [ ][ ]	71-72 [ ][ ]

CARD 2 ←

d. Correspondence, non-service telephone calls, etc.	14-15 [ ][ ]	16-17 [ ][ ]
e. Miscellaneous	18-19 [ ][ ]	20-21 [ ][ ]
2. Resource File		
a. Development	22-23 [ ][ ]	24-25 [ ][ ]
b. Maintenance and up-dating	26-27 [ ][ ]	28-29 [ ][ ]
3. Supervision		
a. Giving	30-31 [ ][ ]	32-33 [ ][ ]
b. Receiving	34-35 [ ][ ]	36-37 [ ][ ]
4. Consultation		
a. Giving	38-39 [ ][ ]	40-41 [ ][ ]
b. Receiving	42-43 [ ][ ]	44-45 [ ][ ]
5. Training		
a. Giving	46-47 [ ][ ]	48-49 [ ][ ]
b. Receiving	50-51 [ ][ ]	52-53 [ ][ ]

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FUNCTIONS (continued)

PERCENT OF TIME (continued)

	Week 1	Week 2
6. Publicity		
a. Monitoring	54-55	56-57
b. Development	58-59	60-61
c. Dissemination	62-63	64-65
7. Community coordination		
a. Liaison with other facilities (non-service related)	66-67	68-69
b. Presentations	70-71	72-73
c. Committee participation	74-75	76-77

CARD 3

8. Advisory board liaison		
a. Preparation	14-15	16-17
b. Participation	18-19	20-21
9. Planning and evaluation		
a. Data gathering	22-23	24-25
b. Data analysis	26-27	28-29
c. Report preparation	30-31	32-33
d. Report dissemination	34-35	36-37
e. Development of new materials	38-39	40-41
f. Liaison with planners	42-43	44-45
g. Discussing evaluation results with centers	46-47	48-49

Other functions or activities

_____	50-51	52-53
_____	54-55	56-57
_____	58-59	60-61

	Week 1	Week 2
TOTAL HOURS	62-65	66-69

Additional comments?

WISCONSIN DEPARTMENT OF HEALTH AND SOCIAL SERVICES DIVISION ON AGING
WISCONSIN INFORMATION AND REFERRAL DEMONSTRATION PROJECT
MONTHLY REPORT OF GRANT EXPENDITURES
BY COMPONENT

_____ Center Code: 4-5 ☐☐

Name and Address of Grantee Organization

Month of _____ 6-9 ☐☐/☐☐
mo yr

EXPENDITURE OF FUNDS	Expenditures For Basic I & R	Expenditures For _____
1. Salaries		
a. Center Manager		
b. Additional Staff		
2. Fringe Benefits		
TOTAL SALARIES AND FRINGES		
3. Travel		
4. Office Occupancy		
a. Rent		
b. Utilities		
c. Other		
5. Office Expense		
a. Equipment		
b. Supplies		
c. Printing & Duplicating		
d. Postage		
e. Telephone		
f. Publicity		
g. Other		
6. Other		
TOTAL DIRECT COST		
In-Kind Expenditures		

8/73 - 500

PUBLICITY REPORT FORM

All articles, news items, reports, etc., in newspapers, on television, radio, or any other medium, concerning your center and/or the state program should be reported to the state office using this form. Please attach a copy of any printed item or a transcript of a radio or television report. (If a transcript is not available, please send as complete a description of the radio or television report as possible.)

NAME OF REPORTING CENTER:

MEDIUM (Check one):

☐ Newspaper ☐ Radio

☐ Television ☐ Other (Please specify.)_____

_____

DATE AND TIME OF DAY OF PUBLICATION OR REPORT:

___/___/___ _____ ☐ a.m. ☐ p.m.

mo day yr time

NAME AND LOCATION OF NEWSPAPER, TELEVISION OR RADIO STATION, ETC.:

NAME:

LOCATION (city):

Did this article or report result directly from a news release by your center?

☐ Yes (If yes, please attach copy of release.)

☐ No (See below.)

If the report did not result from your news release, was there any direct contact on your part with representatives of the media before the report (e.g., an interview, a phone inquiry about the center, etc.)?

☐ No, not that we are aware of.

☐ Yes (If yes, please describe.)_____

_____

_____

ADDITIONAL COMMENTS?

A REMINDER: PLEASE ATTACH REQUESTED COPY, TRANSCRIPT, OR DESCRIPTION.

Wisconsin Information Service

I & R USER SURVEY

FORM ☐☐☐☐☐☐

The Wisconsin Information Service is gathering this information so that it can improve its services to people who need help or information.

Please read each question and place an "X" in the box beside those statements which best describe your experience with the Wisconsin Information Service. Your answers and comments will be kept strictly confidential.

1 Did you call about a problem that you yourself had, or for someone else who had a problem?

- ☐ Myself
- ☐ Someone else – I am a private individual
- ☐ Someone else – I represent a facility

2 How many days did it take before the Wisconsin Information Service helped you or gave you the information you wanted?

- ☐ One day or less
- ☐ Two days
- ☐ Three days
- ☐ Four days
- ☐ Five days
- ☐ Six days
- ☐ Seven or more days
- ☐ They never did help me

3 What do you think of the advice or help that the Wisconsin Information Service gave you?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

4 If a friend of yours had a similar problem, would you recommend that he or she call the Wisconsin Information Service?

☐ Yes ☐ No

5 Do you think you would have found the help or information you needed without the help of the Wisconsin Information Service?

- ☐ No
- ☐ Yes, easily
- ☐ Yes, but it would have been a lot of trouble for me.

---

6 Did you (or the person with the problem) get in touch with any persons or facilities recommended by the Wisconsin Information Service?

☐ Yes (Answer 7) ☐ No (Answer 8) ☐ Don't know (Go to 9)

---

7 a How did you get in touch with the person or facility? (Check all that apply.)

☐ Went there ☐ Phoned ☐ Wrote a letter

b About how long did you have to wait to see or talk to someone?

- ☐ Less than 15 minutes
- ☐ 15 to 30 minutes
- ☐ 30 minutes to 1 hour
- ☐ More than 1 hour (About how long? _____)

c Did the person or facility, give you help with the problems you called the Wisconsin Information Service about?

- ☐ Yes, all of the problems
- ☐ Yes, some of the problems
- ☐ No, not for any of the problems

d Did the person or facility send you somewhere else?

☐ No ☐ Yes (Where? _____)

e Did you go there?

☐ Yes ☐ No

f You know your own situation best. Would you say that the Wisconsin Information Service sent you to the right person or facility?

☐ Yes ☐ No

(over)

8 Why not? (Check all that apply.)

- ☐ None was recommended.
- ☐ I had already called or gone to that facility (or person).
- ☐ I didn't think that facility (or person) could help me.
- ☐ I lost the information about the facility (or person).
- ☐ I haven't gotten around to doing it yet.
- ☐ I had a transportation problem.
- ☐ I had transportation but I didn't want to go that far.
- ☐ I had a problem with the language.
- ☐ It was not open at a time when I could go.
- ☐ I had a babysitting problem.
- ☐ There was no place to park.
- ☐ I couldn't afford to pay for it.
- ☐ I took someone else's advice instead.
- ☐ Some other reason. Please explain briefly.

(over)

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5/73 15000

9 **If you called for yourself**: Have you ever contacted this center before?

☐ No ☐ Yes (How many times?_____)

If you called for someone else: Has that person ever contacted this center before?

☐ No ☐ Yes (How many times?_____)
☐ I don't know

10 If this is the first time you have used the Wisconsin Information Service, how did you hear about it?

☐ Radio
☐ Newspaper
☐ Television
☐ Handbill
☐ Friend or family
☐ Telephone book
☐ Poster or sticker
☐ Outreach worker from Service
☐ Agency or facility (Name _____)
☐ Other (How?) _____

11 **If you called the center for yourself, please check questions 12-18.**

If you called the center for someone else, questions 12-18 should apply to that person. Check one:

☐ **I am answering for myself.**
☐ **I am answering for someone else.**

12 Age group:

☐ 0-9 years
☐ 10-14 years
☐ 15-19 years
☐ 20-24 years
☐ 25-34 years
☐ 35-44 years
☐ 45-54 years
☐ 55-59 years
☐ 60-61 years
☐ 62-64 years
☐ 65-74 years
☐ 75 years or more

13 Sex:

☐ Male ☐ Female

14 Family income group (including all sources of income, such as wages, profits, interest, retirement benefits, etc.):

☐ $0-999
☐ $1,000-3,999
☐ $4,000-5,999
☐ $6,000-7,999
☐ $8,000-9,999
☐ $10,000-11,999
☐ $12,000-14,999
☐ $15,000 or more

15 Education (number of years completed):

☐ No formal education
☐ Some elementary school (1-7 yrs)
☐ Completed elementary school (8 yrs)
☐ Some high school (9-11 yrs)
☐ Completed high school (12 yrs)
☐ Some college (13-15 yrs)
☐ Completed college (16 yrs)
☐ Post-graduate education (17+ yrs)

Currently in school or formal education course?

☐ Yes ☐ No

16 Racial or ethnic identification:

☐ White
☐ Black or Negro
☐ American Indian
☐ Spanish American (including Mexican, Puerto Rican, Cuban)
☐ Oriental
☐ Other (Specify _____)

17 Presently receiving Social Security benefits of any sort?

☐ Yes ☐ No

18 Residence:

☐ Lives alone
☐ Lives with family
☐ Lives with unrelated persons or friends
☐ Other (Explain _____)

19 **The person who called the center should answer this question.** Do you have any suggestions for how we might improve the Wisconsin Information Service?

Manitowoc Co

SUMMARY OF I&R SERVICES DELIVERED

October 1, 1973 to October 31, 1973

Calls Received

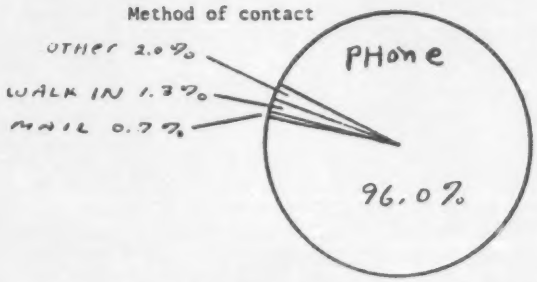
Total calls 152

Percent AM 56.6 PM 41.4 Not recorded 2.0

Mon 26.3 Tu 17.8 Wed 11.0 Thur 14.5 Fri 17.8

Sat - Sun 1.3 No Response 1.3

Method of contact



Time required to help caller

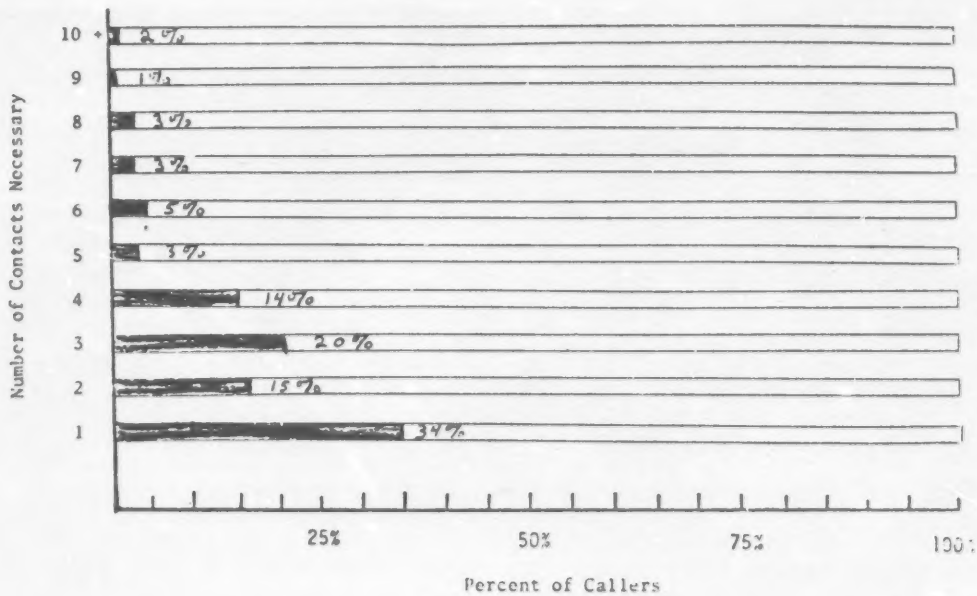
Median 25MIN Range 2 MIN - 4 hrs

Days required to help caller

One 75.0 Two 11.8 More than two 13.2

Not recorded -

Number of contacts required to help caller



Problems Presented

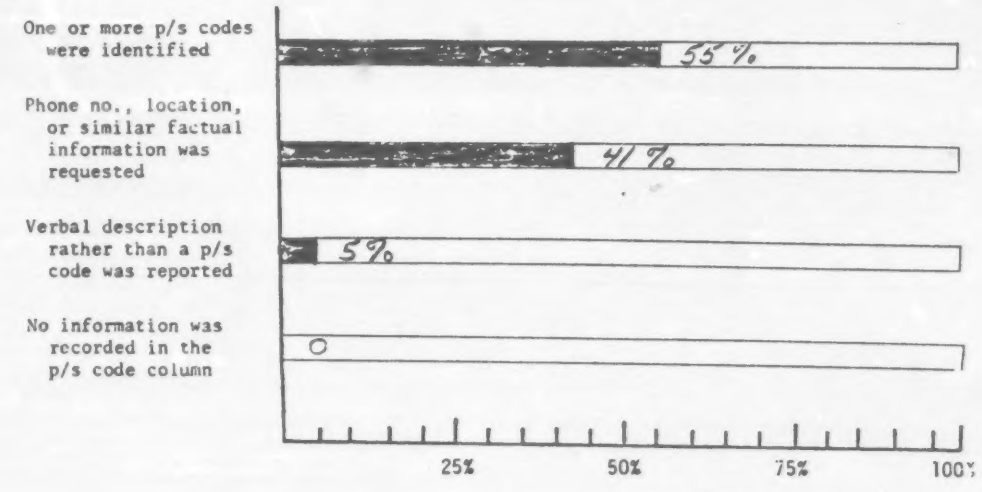
Number and percent of times a problem was identified in each category

Category	Number	Percent	Category	Number	Percent
Clothing	1	0.7	Housing	17	12.0
Consumer Protection	9	6.3	Insurance	5	3.5
Disasters	—	—	Law Enforcement	—	—
Education	2	1.4	Legal	5	3.5
Employment	8	5.6	Life & Death Emergencies	—	—
Environmental Health	3	2.1	Medical	20	14.1
Family	21	14.8	Recreation	3	2.1
Financial	19	13.4	Transportation	5	3.5
Food	8	5.6	Veterinary	—	—
Government	5	3.5	Volunteerism	6	4.2
Household Essentials	3	2.1	Well Person	2	1.4

(Total number of problem/service codes identified 142)

Average number of problem/service codes identified per user: Median 1
Range 0-4

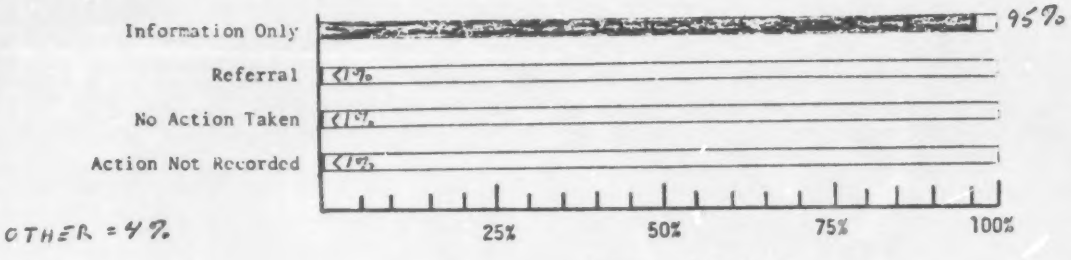
Percent of calls for which:



(Percent add to more than 100 because some Caller Interview forms had both problem/service codes identified and verbal description written in.)

Action Taken by Center

Percent of problems identified for which the following actions were taken:



OTHER = 4%

Average number of unique resource file facilities recorded per user

Median 1 Range 0-4

Percent of resource file used to date in delivering I&R 29.7%
(Number of unique facility numbers used 47
divided by the estimated number of facilities in resource file 158)

Facilities which have been used to date and frequency with which each has been used:

Role of the I&R Center N = 152

Percent of users for whom an appropriate service was found in the interviewer's estimation

Frequency with which possible roles of the I&R center were mentioned and frequency with which each was felt to be the most important role played

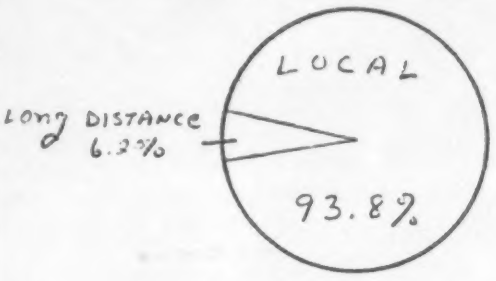
Role	N = 219 Percent of Times Mentioned	N = 152 Percent of Times Checked Most Important
Help caller clarify problem	3.7% (8)	2.6% (4)
Verify what the caller already knew	1.8 (4)	0.7 (1)
Give information only about facilities and services	27.9 (61)	24.3 (37)
Encourage a caller who was reluctant or unsure about seeking a service	4.1 (9)	2.6 (4)
Make a formal referral	0.5 (1)	—
Arrange for contact by another facility or person	4.1 (9)	4.6 (7)
Give information about a factual issue other than facility services, eligibility, or procedures	56.6 (124)	64.5 (98)
Act as mediator between caller and another facility	0.9 (2)	0.7 (1)
Give reassurance to caller	0.5 (1)	—
Call inappropriate for I&R service	—	—

*Number in parentheses is the frequency.

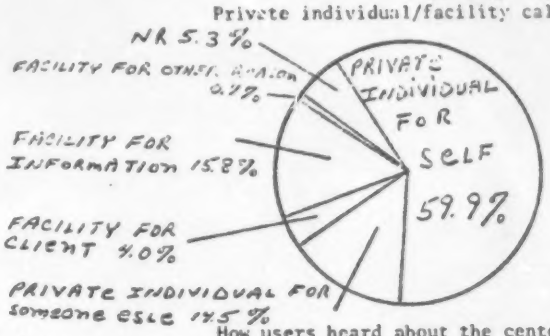
Average number of roles checked per user: Median 1 Range 1-4

Description of Users

N=146 Local/long distance callers



N=152 Private individual/facility callers

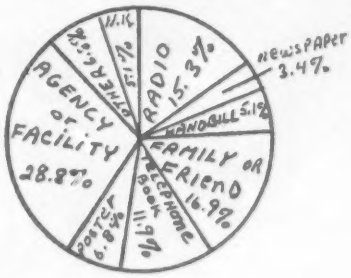

NR 5.3%
FACILITY FOR OTHER AREA 0.7%
PRIVATE INDIVIDUAL FOR SELF 59.9%
FACILITY FOR INFORMATION 15.8%
FACILITY FOR CLIENT 4.0%
PRIVATE INDIVIDUAL FOR SOMEONE ELSE 14.5%

Percent of users who agreed to follow-up survey 59.2%

Percent of User Surveys returned 55.6%

Number of User Surveys returned from first-time users 38

How users heard about the center N=59



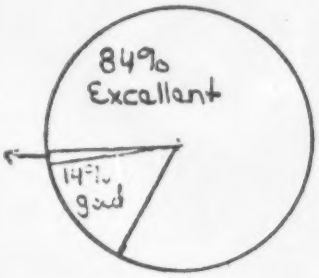
(The Following Figures are Based on First-Time Users Only)

Age group	Number	Percent
0- 9 years	–	–
10-14	1	2.6
15-19	–	–
20-24	6	15.8
25-34	8	21.1
34-44	6	15.8
45-54	1	2.6
55-59	3	7.9
60-61	4	10.5
62-64	1	2.6
65-74	5	13.2
75 years or more	1	2.6
NR	2	5.3
Sex		
Male	6	15.8
Female	30	78.9
NR	2	5.3
Racial or ethnic identification		
WHITE	37	97.4
NR	1	2.6

Family income	Number	Percent
$0-999	1	2.6
1,000-3,999	3	7.9
4,000-5,999	7	18.4
6,000-7,999	4	10.5
8,000-9,999	4	10.5
10,000-11,999	4	10.5
12,000-14,999	7	18.4
15,000 or more	2	5.3
NR	6	15.8
Education Level		
No formal education	–	–
Some elementary	1	2.6
Completed elementary	7	18.4
Some high school	2	5.3
Completed high school	16	42.1
Some college	7	18.4
Completed college	1	2.6
Post-graduate education	2	5.3
NR	2	5.3

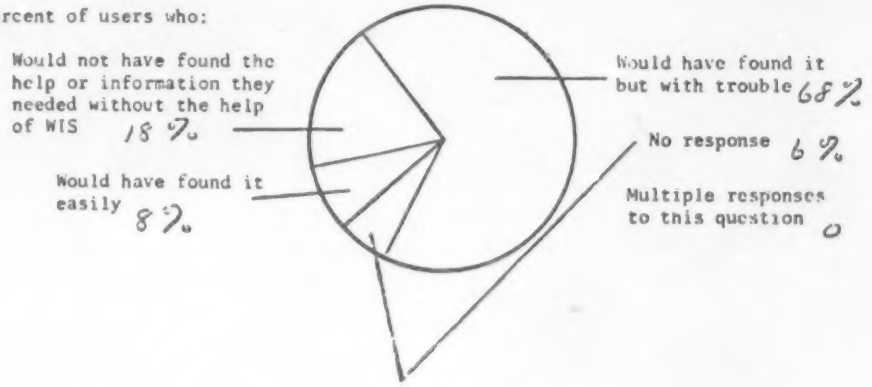
User Satisfaction N = 50

Users' evaluations of the advice or help they got from the Wisconsin Information Service



Percent of users who said they would recommend WIS to a friend 98.0%
N.R. = 2.0%

Percent of users who:

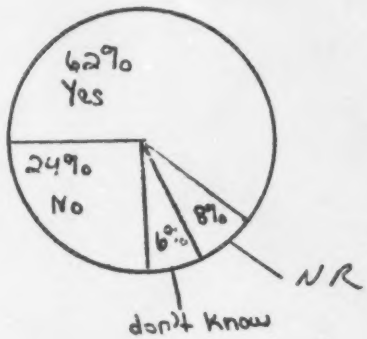

Would not have found the help or information they needed without the help of WIS 18%
Would have found it easily 8%
Would have found it but with trouble 68%
No response 6%
Multiple responses to this question 0

Percent of users who felt that WIS sent them to the correct facility or person (For those who did get in touch with some facility or person recommended by WIS) 87.1%

No = 3.2%
N.R. = 9.7%
N = 31

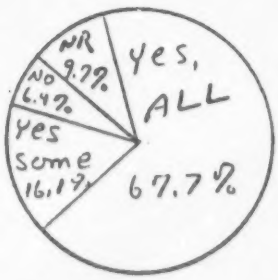
Results of Actions Taken by Users N=50

Percent of users who said they got in touch with facilities or persons recommended by WIS. (Both formal and informal referrals are combined here)

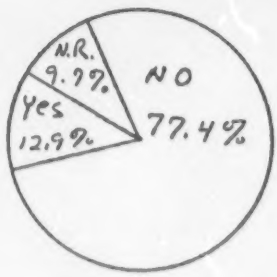


FOR THOSE WHO RESPONDED "YES" ABOVE: N=31

"Did the person or facility give you help with the problems you called about?"



"Did the person or facility send you elsewhere?"



FOR THOSE WHO RESPONDED "NO" ABOVE: N=13

Reason Why User Did Not Get In Touch	Number of Times Reason Mentioned
Had already gone there	1
Didn't think that facility could help	—
User lost the information	—
Hadn't gotten around to it yet	2
Transportation problem	—
Too far to go	1
Language problem	—
Inconvenient hours	—
Babysitting problem	—
No place to park	—
Couldn't afford to pay for service	1
Took someone else's advice	1
Other	4
None Recommended	2
NR	1

FACILITIES USED DURING OCTOBER, 1973

BY CENTER 09

Facility Number	Frequency of Use
0002	1
0003	6
0005	6
0006	3
0007	1
0008	2
0009	4
0012	3
0013	3
0014	2
0016	2
0017	3
0018	12
0019	7
0021	2
0022	1
0025	1
0026	1
0027	2
0034	1
0037	1
0040	2
0046	2
0052	1
0058	6
0059	2
0062	2
0064	1
0065	2
0068	2
0084	1
0087	2
0088	1
0089	1
0090	1
0096	1
0097	1
0101	1
0103	1
0108	1
0117	2
0129	2
0144	1
0148	1
0150	1
0155	1
0156	6

Facility Number	Frequency of Use
01-0248	1
01-0335	2
01-0349	1
01-0411	1
08-0019	1

Total Facilities - same center 47

Total Facilities - other 5

Total Facilities - all centers 52

Total Uses - all centers 115

Date Sent:

Update for MANITOWOC (09) on October, 1973 data

CIFs Received 161

% agreed to receive IRUS 58.4 %

% of IRUS returned 77.7 %

Number of IRUS from first time users 50

Age distribution of first time users (numbers in parentheses are the frequency)

NR (5) 10.0%	0 - 9	—		45 - 54 (2)	4.0%
	10 - 14	—		55 - 59 (4)	8.0
	15 - 19	(2)	4.0%	60 - 61 (4)	8.0
	20 - 24	(6)	12.0	62 - 64 (2)	4.0
	25 - 34	(12)	24.0	65 - 74 (5)	10.0
	35 - 44	(8)	16.0	75 & over —	

Family income distribution of first time users (numbers in parentheses are the frequency)

NR (10) 20.0%	$0 - 999	(1)	2.0%	$8,000 - 9,999 (8)	16.0
	1,000 - 3,999	(4)	8.0	10,000 - 11,999 (6)	12.0
	4,000 - 5,999	(8)	16.0	12,000 - 14,999 (5)	10.0
	6,000 - 7,999	(5)	10.0	15,000 & over (3)	6.0

Found Help Without WIS? N = 73

No 17.8 %; Yes, easily 5.5 %; Yes, but difficult 68.5 %; NR 8.2 %

Got In Touch With WIS Recommended Facility? N = 73

Yes 72.5 %; No 15.0 %; Don't know 2.5 %; NR 10.0 %

Get Help From Facility? N = 47

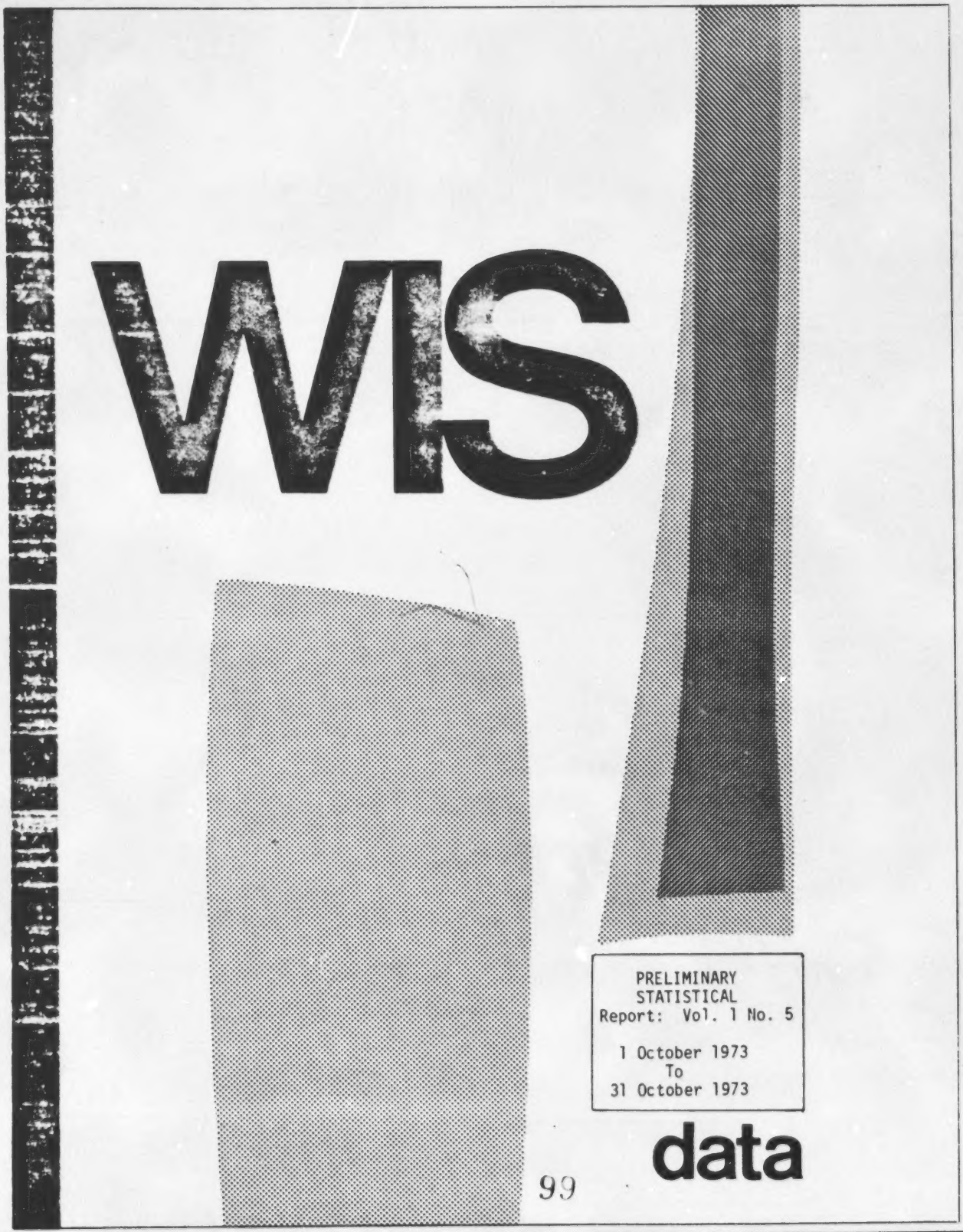
Yes for all 72.3 %; Yes, for some 14.9 %; No 6.4 %; NR 6.4 %

Sent Elsewhere by Facility? N = 47

No 78.7 %; Yes 10.6 %; NR 10.6 %

Did WIS Send You to the Correct Place? N = 47

Yes 89.4 %; No 2.1 %; NR 8.5 %


WIS
PRELIMINARY
STATISTICAL
Report: Vol. 1 No. 5
1 October 1973
To
31 October 1973
data

INTRODUCTION

This is the fifth in a series of reports about center operations in the Wisconsin Information Service (WIS). The data presented here cover the activities of all WIS centers operating during October, 1973.

Data in this report were obtained from two forms used by the WIS centers in their daily operations: the Caller Interview Form and the I & R User Survey. Since this report is based on data entered onto the computer shortly after the end of October, it does not contain all of the forms for that month. This is particularly the case for the I & R User Survey; many of those mailed near the end of the month had not been returned in time for this report. The September, 1973 monthly report reflected a similar undercount. An abreviated update of that report has been added at the end of this report.

In October four WIS centers added an outreach component to their services. Each outreach contact or attempted contact is recorded on a Caller Interview Form in much the same manner as other inquiries. However, all data relating to the outreach component at the four WIS centers have been deleted from this report. These data will be reported separately. Data relating to regular, non-outreach activities in the four centers have been included as usual.

Also in October four other WIS centers added escort/transportation and follow-through components to their services. Some data about these components are reflected in this report.

Throughout this report "NR" means "no response recorded". When more than one answer to a question is allowed, percentages may exceed 100%. Percentage totals may also deviate slightly from 100% due to rounding error. If a percentage reported is actually less than 1/2 of 1%, it is written: <1% (read "less than 1%"). The report is organized as follows:

INTRODUCTION	Page 1
CALLS RECEIVED	2
PROBLEMS PRESENTED	4
ACTIONS TAKEN BY THE CENTER	5
ROLE OF THE I & R CENTER	5
DESCRIPTION OF USERS	7
USER SATISFACTION	9
RESULTS OF ACTIONS TAKEN BY USERS	10
SEPTEMBER UPDATE	11

CALLS RECEIVED

The total number of inquiries received was 1039. Generally they were initiated by phone calls (92%, including messages received by center answering services) as is snown in Figure 1.

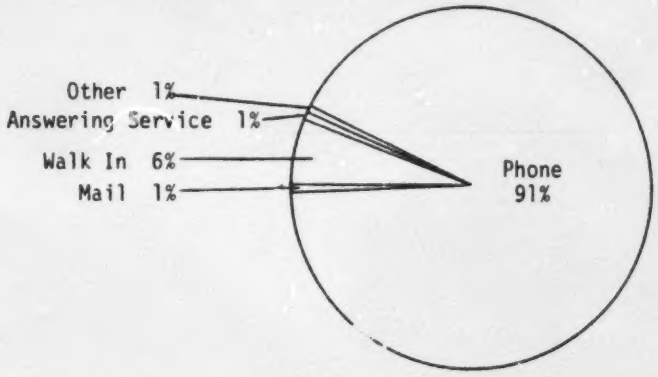


Figure 1. Method of initial contact with the I & R center.

The calls were split between morning (50%) and afternoon (47%) with the time of day not recorded on 3% of the forms. The distribution of calls by day of the week was Monday (21%), Tuesday (26%), Wednesday (20%), Thursday (17%), Friday (14%), (NR = 1%). WIS centers were not open on the weekend. The median time required to handle an inquiry was 10 minutes, with a range from one minute to 18 hours. The median number of days required to provide service to a caller was one (Figure 2).

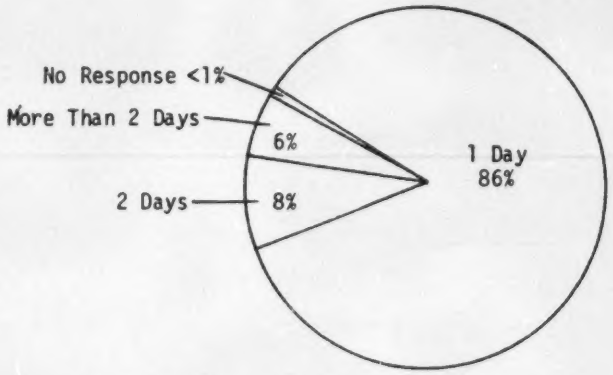


Figure 2. Number of days required to handle inquiries.

Forty-five percent of the callers were helped in the initial contact (Figure 3).

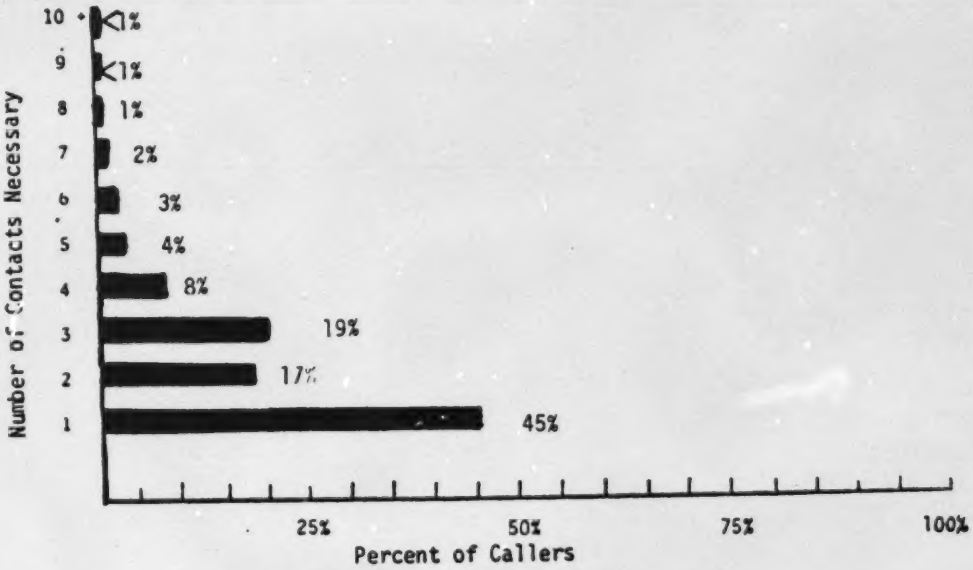


Figure 3. Number of contacts required to handle inquiries.

PROBLEMS PRESENTED

The median number of problems categories identified per user was one with a range of zero to six. The most frequently cited problem categories were Family (14%), Medical (13%), Financial (9%), Housing (8%), and Consumer Protection (8%) as is indicated in Table I. An additional 412 instances of requests (24% of the calls) were for factual data such as a phone number or an address.

TABLE I

Number and Percent of Times Problem Categories were Identified*

Category	Number	Percent	Category	Number	Percent
Clothing	11	1	Housing	108	8
Consumer Protection	102	8	Insurance	75	6
Disasters	0	0	Law Enforcement	10	1
Education	55	4	Legal	71	5
Employment	72	5	Life and Death Emerg.	7	<1
Environmental Health	34	3	Medical	169	13
Family	188	14	Recreation	30	2
Financial	115	9	Transportation	32	2
Food	58	4	Veterinary	4	<1
Government	81	6	Volunteerism	66	5
Household Essentials	9	1	Well Person	33	2

* Total number of problem categories identified = 1330

At least one codeable problem category was identified in 72% of the 1039 inquiries. In 3% of all inquiries only verbal descriptions of problems were given. In only 1% of the contacts was no information at all recorded about the caller's problem.

ACTIONS TAKEN BY THE CENTER

Giving information with regard to a problem or about a facility was by far the most common of the 1870 actions recorded (Figure 4).

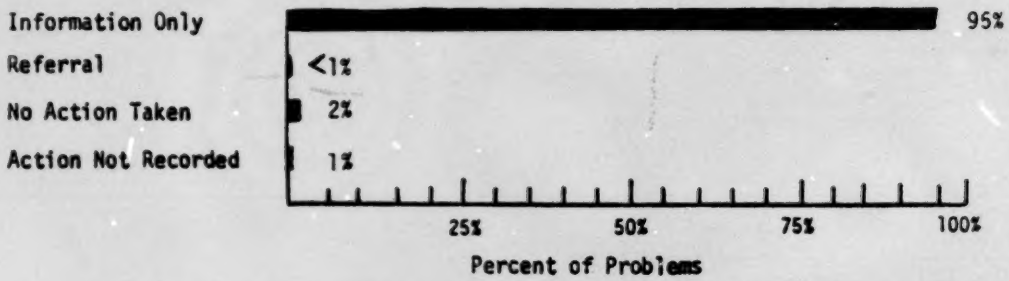


Figure 4. Types of actions taken.

The median number of unique facilities accessed per inquiry was one with a range of zero to eight. (Only unique facilities were counted for each inquiry. Thus if a caller had several problems and if the same facility was used for each problem, the facility was counted only once in the calculation above).

For all centers 569 different facilities were used during this period. This represents 16% of the combined resource file for all centers for this report (3675 facilities as of October, 1973). (Each center receives, along with statistics on its own operation, a list of those facilities in its resource file that were used and the frequency with which each was used during this report period).

ROLE OF THE I & R CENTER

WIS workers have generally felt that they were able to help people with the problems they presented (Figure 5).

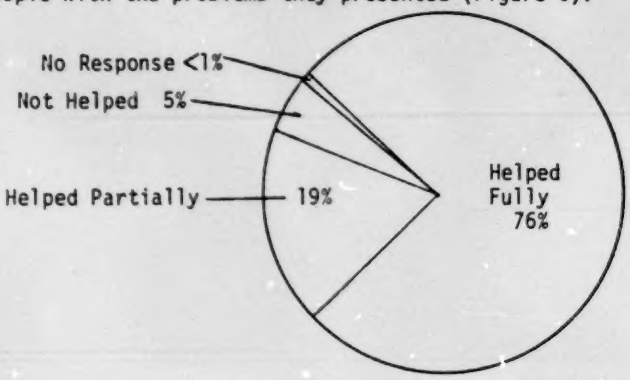


Figure 5. Percent of users for whom an appropriate service was found in the WIS interviewer's estimation.

The roles WIS played in assisting callers and the frequency with which interviewers believed each was the most important role played are shown in Table II.

TABLE II

Frequency with which Possible Roles of the I & R Center were Mentioned and Frequency with which Each was Felt to be the Most Important Roles Played.

Role	Percent of Times Mentioned		Percent of Times Checked Most Important[a]	
Help caller clarify problem	2%	(30)[b]	1%	(8)
Verify what the caller already knew	2	(30)	<1	(4)
Give information only about facilities and services	57	(783)	64	(668)
Encourage a caller who was reluctant or unsure about seeking a service	3	(39)	1	(12)
Make a formal referral	<1	(1)	-	-
Arrange for contact by another facility or person	3	(43)	3	(33)
Give information about a factual issue other than facility services, eligibility, or procedures	27	(377)	27	(277)
Act as mediator between caller and another facility	2	(35)	1	(14)
Give reassurance to caller	1	(15)	<1	(2)
Call inappropriate for I & R service	1	(17)	1	(15)

[a]No response was recorded in 6 cases
[b]Number in parentheses is the frequency

DESCRIPTION OF USERS

Most incoming phone calls were local (83%). Also, most inquiries (82%) were by private individuals calling for themselves or for someone else (Figure 6).

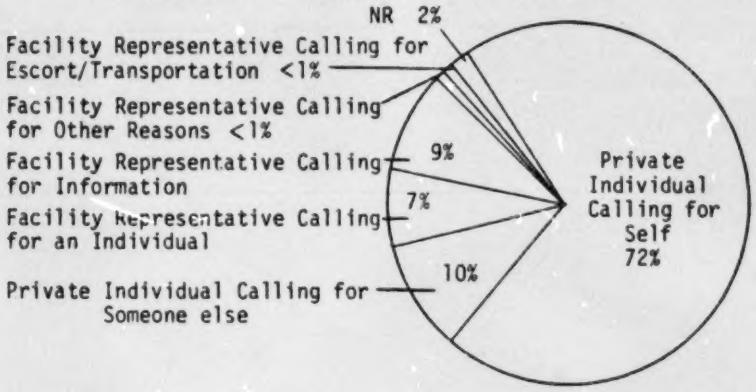

NR 2%
Facility Representative Calling for Escort/Transportation <1%
Facility Representative Calling for Other Reasons <1%
Facility Representative Calling for Information
Facility Representative Calling for an Individual
Private Individual Calling for Someone else
9%
7%
10%
Private Individual Calling for Self 72%

Figure 6. Percent of inquiries from private individuals and from facility representatives.

Sixty-one percent of all users were asked and agreed to receive the follow-up survey during October, 17% were asked but declined, and 22% were not asked. Of those who agreed to receive the survey, 43% had been returned at the time this report was written. (See the comment on the return of forms in the introduction). Sixty-five percent of the surveys returned were from first-time users of WIS.

Knowledge of the WIS center was sparked mainly by service agencies (25%) and by family or friends (13%) as is shown in Table III.

TABLE III

How Users Heard About the Center

Method	Frequency	Percent
Radio	26	8%
Newspaper	32	10
Television	7	2
Handbill	23	7
Friend or Family	39	13
Telephone book	29	9
Poster or sticker	21	7
Outreach worker	2	1
Agency or facility	78	25
Other	22	7
No response	31	10

Who used WIS? Among the October first-time users (N = 176) who had returned the follow-up survey, there were 71% women and 24% men (NR = 5%). The median income category reported was $8,000 - $9,999 (Table IV).

TABLE IV

Family Income of First Time Users

Income	Percent
$ 0 - 999	6
1,000 - 3,999	14
4,000 - 5,999	14
6,000 - 7,999	7
8,000 - 9,999	10
10,000 - 11,999	12
12,000 - 14,999	10
15,000 or more	9
No response	18

Ninety-one percent of the respondents were White, 2% were Black, 2% were American Indian, and 1% was Spanish-American (NR = 4%). The median educational level of respondents was 12 years of school with a range from no formal education to post-graduate education. Approximately 30% of respondents were 55 years old or older (Table V).

TABLE V

Age of First Time Users

Age	Percent
0 - 19	9
20 - 24	17
25 - 34	23
35 - 54	17
55 - 64	13
65 and older	5
No response	5

USER SATISFACTION

When looking at user satisfaction and the results of actions taken by users, both first-time and repeat users are counted in order to reflect the quality of service given and the results of each call to the center; a total of 271 surveys were returned from both first-time and repeat users during October.

On 95% of the surveys returned respondents reported that WIS offered them excellent or good advise (Figure 7). In addition, 97% of the respondents said they would recommend WIS to a friend.

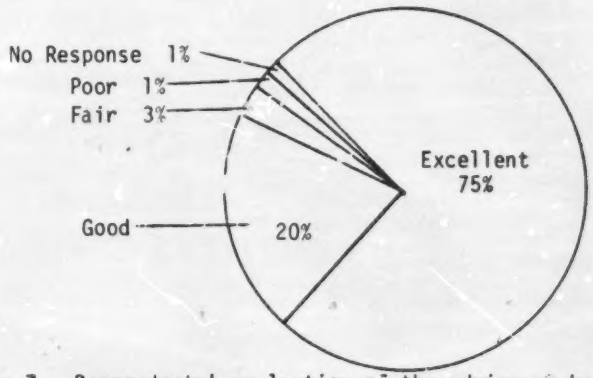


Figure 7. Respondents' evaluation of the advice or help given to them by WIS.

The public also indicated that assistance given by WIS was a significant time and trouble saver in obtaining the information neeced to solve their problems (Figure 8).

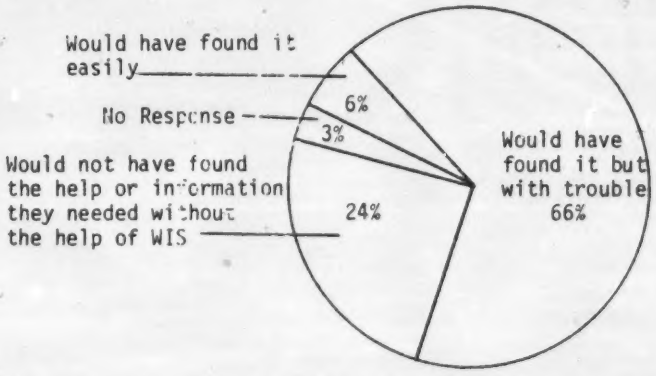

Would have found it easily
6%
No Response
3%
Would not have found the help or information they needed without the help of WIS
24%
Would have found it but with trouble
66%

Figure 8. Percent of respondents who reported they would/would not have found help without the assistance of WIS.

One reason for this satisfaction with the service provided by WIS may be that the information given was accurate in their eyes. Eighty-nine percent of those contacting a facility recommended by WIS felt it was a correct suggestion while only 2% felt it was not (NR = 9%).

RESULTS OF ACTIONS TAKEN BY USERS

The majority of users to whom WIS recommended facilities proceeded to act on the recommendation (Figure 9).

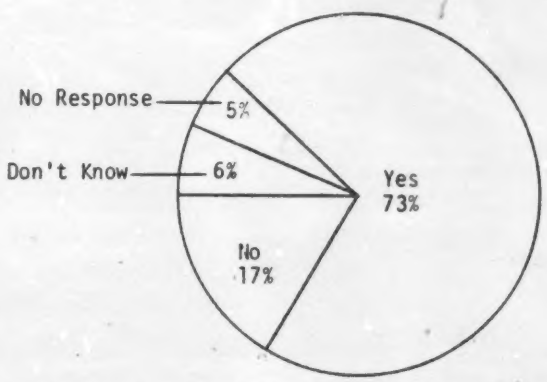


Figure 9. Percent of respondents who said they got in touch with facilities or persons recommended by WIS.

Of those who got in touch with a recommended facility, 89% said they received help for some or all of their problems (Figure 10).

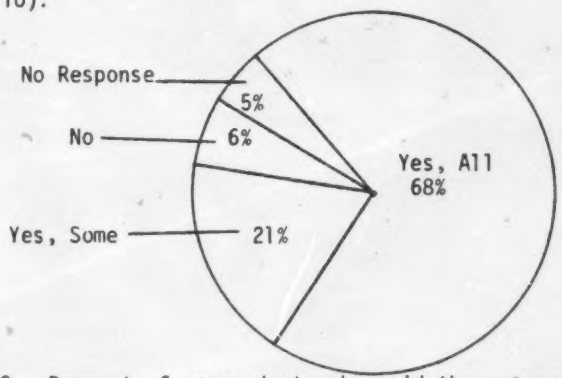


Figure 10. Percent of respondents who said the recommended person or facility gave them help with the problem about which they called.

However, 15% of those who contacted the person or facility recommended by WIS were sent elsewhere for some or all of their concerns (Figure 11).

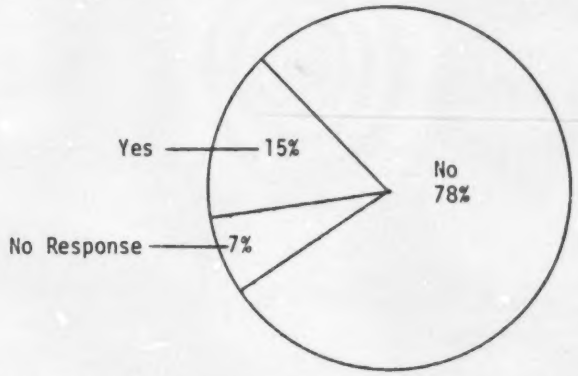


Figure 11. Percent of respondents who reported that the recommended person or facility sent them elsewhere.

In a checklist of reasons given for not getting in touch with a person or facility recommended by WIS, the most frequent responses given were "none recommended", "had already gone there", "didn't think that facility could help", and "haven't gotten around to it yet". Only two people cited financial barriers and only one person cited transportation problems as hindering them from obtaining service.

SEPTEMBER UPDATE

Additional data entered onto the computer after the publication of the September, 1973 monthly report have now been analyzed. The number of inquiries recorded rose by 3% from 943 to 974. Most dramatically, the number of I & R User Surveys returned doubled from 202 to 404. This represents 74% of all those who agreed to receive the survey. Similarly, the number of surveys returned by first-time users was more than doubled. While these increases are quite large they seemed to have only a minimal effect upon the percentage data already published. A spot check showed changes generally were less than 1% by category of response. More complete updated September figures will appear in the quarterly report.

Information and Referral Services:

STRUCTURED INTERVIEW FOR EVALUATION

prepared by

InterStudy

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Minneapolis, Minnesota 55403

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Administration on Aging

1 October 1973

INFORMATION AND REFERRAL SERVICES:

STRUCTURED INTERVIEW FOR EVALUATION

Introduction

This interview schedule is designed to provide additional evidence of an experiential and subjective nature concerning the demonstration project Wisconsin Information Service (WIS). The questions on this schedule complement the quantitative data being gathered from the daily operations of WIS. Both sets of data derive from the evaluation matrix described in the InterStudy publication Information and Referral Services: Evaluation Design for a Network Demonstration. Many of the questions contained on this schedule concern "process" elements of the evaluation.

This schedule is multipurpose and will be given to all participants in the demonstration. Thus, not all questions apply to all participants. The following code is used to identify the general category of participant to whom the schedule will be given:

C = Center Staff

P = Planners and Administrators

S = State Office Staff

Specific questions on the schedule are keyed according to the category of participant who is expected to answer that question.

Overall Reaction to WIS

1. What is your overall reaction to WIS as an approach for improving access to human services, in general, and specifically with regard to older people? CPS

2. What are the particular strengths and weaknesses of WIS with regard to improving access to services? CPS

3. What is the primary basis for your opinion about the network (e.g., word of mouth--users, staff, other administrators, evaluation and data reports, etc.)? CPS

4. Given your overall assessment of WIS (either positive or negative), what factor(s) do you think were key in leading to this outcome (e.g., staff competency, need for service in your area, agency politics, etc.)? CPS

Center Goals

1. In your opinion, does your I & R service increase the accessibility of services to the people who live in your center's area? C

2. Is increasing service accessibility a realistic goal for an I & R service? C

3. Which population(s) in your center's area are not using the center? C

4. What could your center do to help improve access for these individuals? C

5. Specifically, are you satisfied that all persons age 60 and over have access to all services they need? Are these persons aware that they can contact your center to link them with services? C

6. What are the limitations of an I & R service program with regard to achieving the goal of increasing access to services? What would be needed for you to overcome these limitations? Which limitations could not be overcome due to the basic nature of an I & R service? CPS

7. What additional or different goals would you set for your I & R center? C

8. Based on your experience to date, and your knowledge of the different services that your center provides (e.g., information, referral, follow-through, escort, or outreach), which services, if any, do you believe are crucial for the area you serve (i.e., justify continued community support and funding of your service)? Which services, if any, could be cut back or terminated without severely damaging your center's program? C

Resource File

1. What changes, if any, would you recommend for gathering facility information (e.g., method of contact, time, gathering information prior to opening your center, etc.)?

CS

2. What is the general quality of the information that you gathered about service facilities with the SEARCH Inventory? What additional information do you need that is not available from the SEARCH Inventory?

C

3. What was your general experience with facilities in interviewing them? Which were more or less cooperative?

C

4. Based on use to date, how complete and accurate does your file seem to be?

CS

5. How does the filing system seem to be working?

C

6. What changes in the filing system should be made?

CS

7. For what proportion of your calls do you not use each of these components of the resource file?

C

	Use	Not Use	Total
Code Cards			
Facility Notebook			
Cross-Reference File			
Master Booklet			

8. Which aspects of setting up the file seemed most troublesome? What would you recommend to overcome these problems?

CS

9. What problems have you encountered in keeping the file up-dated?

C

10. How many facilities do you up-date each month? Of those, what proportion require follow-up contact by you to get the materials returned?

C

11. Which aspects of your up-dating procedures seem to be most effective?

C

12. Which kinds of facilities seem to give the greatest problem with regard to up-dating? Why? What might be done to improve your experience with them?

C

13. What proportion of up-date information results from informal sources (e.g., something you see in the newspaper or hear about by accident)?

C

14. Have any facilities called spontaneously to tell you about changes? If so, how many and what kind of facilities?

C

Publicity

1. What is your subjective impression of who was and who wasn't reached through your publici.y efforts?

CS

2. Which specific publicity techniques seemed to work best, and for which population(s)? Which did not work well, and why?

CS

3. What problems or unexpected effects have you encountered in implementing your publicity program?

C

Program Components

1. What effect have the following had on your center's users' access to services: referral, follow-through, escort, and outreach?

CPS

2. What impact does providing referral, follow-through, escort, or outreach, have on the acceptance and use of your center by

CP

a) the community at large; and b) service facilities?

3. Does there seem to be an under-use of referral or escort by different population groups? Which in particular? For what reasons?

CS

4. Has your experience with referral, follow-through, escort, or outreach led you to make any changes in

CS

a) your procedures with callers; or b) your resource file information?

5. What is your opinion about the a) escort/follow-through, or b) outreach program? Is it a good way for an I & R center to increase access to services, particularly for the aged?

CPS

6. What alternatives to case-finding (outreach) may work equally well in your area? What alternatives have actually been tried in your area? How successful were they?

CPS

7. Should your a) escort/follow-through or b) outreac' program continu to operate? If yes, is there a problem of over-saturation or over- If no, should it be repeated? How soon? Why?

CPS

8. Which aspects of your a) escort/follow-through or b) outreach program were most/least successful? Why?

C

9. What was the general reaction of your community to your a) escort/follow-through or b) outreach program? How was it accepted by the community?

C

10. What are the limitations of this program as it now stands? What would you do to improve it?

C

11. Were there any unexpected or unusual effects on the community or your center because of the program?

C

12. What particular problems came up in implementing the program?

C

13. Compare the effectiveness of your outreach program with that of your publicity effort. If you had to chose between publicity or outreach, which would you prefer? Why?

C

Location and Sponsorship of the Center

1. Does the physical location and/or host agency sponsorship of your center affect the kind of person who comes to it? Do these factors affect the kinds of problems that are presented to you?

C

2. What particular kinds of people tend to use or not use your center? Is this due to the center's location or sponsorship?

C

3. What do you think of the idea of different host agencies sponsoring WIS centers? What advantages or disadvantages have resulted from sponsorship by your own host agency?

CPS

4. Is the "network umbrella" of WIS helpful or not helpful? Is it more or less helpful than the "umbrella" of your host agency?

CPS

5. Would your center be more effective if located physically somewhere else? If so, where do you think it should be located? Would you be more effective if there were additional or satellite centers serving your area?

CS

6. What effect would it have to change the sponsoring or host agency of your center? Would some other host agency be more appropriate for your center? Why?
C

7. Would your center be more or less effective if it were free-standing and totally unrelated or unidentifiable with any host agency, other than WIS?
CPS

8. Have there been any unexpected outcomes (positive or negative) for your host agency as a result of sponsoring WIS? Has your office been affected directly or indirectly because of this? Have other departments or facilities been affected as a result of these unexpected outcomes?
CPS

9. What is your relationship with your host agency (e.g., friendly and helpful, indifferent, antagonistic)?
CPS

10. How closely is your work monitored or supervised by staff from the host agency?
CPS

11. Do you ever get caught in the middle between WIS demands and host agency demands?
CPS

12. With whom do you relate more closely: your host agency, WIS, or neither?
CPS

Advisory Board

1. Who is on your advisory board? Attach a list of names and background information.
C

2. How were members selected to participate on your board? What was the rationale for this composition?
C

3. Who seems to be the most or least helpful on your board? What factors explain the degree of helpfulness of different board members?
C

4. If you were to begin again, what would you do differently in selecting and developing your board?
C

5. What specific problems has your board given you help with?
C

6. What are the general strengths and weaknesses of your present board?
C

7. When did your board first meet as a board? How many times has it met since then? Does it meet on a regular schedule?

C

8. What role do you and your center staff play in board meetings?

C

9. Describe what happens during a typical board meeting (e.g., Who presides? Are minutes read? Is there an agenda sent out ahead of the meeting? Who prepares the agenda? Are rules of order followed?)

C

10. If you do not have a board, why not?

C

11. Do you plan to develop an advisory board? If yes, what steps are currently being taken toward this end? When do you expect the board to meet as a board? If no, why not?

C

Staff Qualifications

1. What educational and work experiences should be necessary requirements to do your job? What special skills are needed?

CPS

2. Is a "professional" needed to do your job? How would you describe a "professional" (e.g., experience, education, a way of behaving, or some combination of these or other factors)? Do you consider yourself a professional?

CPS

3. What functions or activities at your center are particularly suited for a) volunteer staff and b) non-professional staff?

CS

4. What are the key characteristics you would look for in hiring someone to replace you on the job?

CS

Volunteers

1. How much time have you spent on recruiting volunteers? On training volunteers? Do you feel it was worth it?

C

2. How many volunteers have worked for you? What did they do?

C

3. What particular advantages and disadvantages have you experienced in having volunteers work for your center?

C

4. If you had not had volunteer help, how else might the work have gotten done? How much delay would have been involved?

C

5. Based on your experience to date with volunteers in WIS, what observations do you have about their use in the following?

	Resource File Development	Delivering I & R Services
Recruitment		
Training		
Supervising		

6. What have been the primary sources from which you have obtained volunteer help? What kinds of people have your volunteers been (experience, education, etc.)?

Consultants

1. Have you used or do you use community consultants? If yes, list their names and qualifications.
2. How many persons are regularly maintained as consultants by your center?
3. How many times a month do you contact your consultants?
4. What is the average amount of time spent with a consultant?
5. What is the average cost per hour of consultant time?
6. Do you follow-up on the advice given to check its quality? If so, how good do you find the help given by your consultants?
7. What characteristics do you feel make a consultant most helpful for your center (e.g., experience, professional training, knowledge of the community, agencies, and people, etc.)?
8. Do the kinds of calls you receive and the other matters you must deal with in your center require having a consultant available? Could you easily get along without consultants? Are there any specific instances when you felt the need for a consultant?
9. Does the knowledge that you have consultants available increase the general acceptance of your center by either the man in the street or staff at other agencies?

Training

1. Do you adhere strictly to the guidelines presented in training sessions by the state staff?

CS

2. Which guideline(s) do you find hardest to follow, disagree with, or disregard? Why?

CS

3. Have the training sessions been sufficiently detailed, well-organized, and clear for you to understand fully your duties and responsibilities?

CS

4. What suggestions do you have for improving the training that you have received?

CS

State Office Support

1. What is your general evaluation (e.g., 1 = excellent, 2, 3, 4, 5 = poor) of communications between field and central office?

CS

Project Director

Research Director

Field Supervisor

Research Aide

Publicity Officer

2. Which communication techniques do you find the most and the least helpful and important for your center's functioning? Rank order.

CS

Consultation (Field Supervisor, Research Aide, Administration, etc.)

Training (Formal or In-service or On-the-Job)

Newsletter

Monthly Data Reports

Regional Meetings

Informal Contacts (By telephone, at training sessions, etc.)

Other (Specify)

3. In what way(s) could communications between field and central office be improved (e.g., frequency of contact, more regular schedule, etc.)?
CS

4. What specific changes have occurred in the operation of your center as a result of feedback and evaluation? At whose initiative did these changes take place(e.g., yours, host agency supervisor, state staff)?
CS

5. What changes have taken place in written guidelines, forms, etc., as a result of feedback provided by your center or other centers?
CPS

6. Which centers (and kinds of personnel) seem more receptive and less receptive to receiving feedback?
PS

7. How helpful do you feel the consultation by state staff has been (1 = excellent, 2, 3, 4, 5 = poor)? How would you compare it with consultation from local consultants?
CS

Field Supervisor (name)

Research Aide (name)

Project Director

Research Director

Publicity Director

8. Can you cite any instances in which you have changed or improved your work methods as a result of such consultation?
CS

9. Do you feel that the continuation of state staff consultation is useful and necessary? Are there any aspects of this consultation which could be discontinued?
CS

10. What aspects of the current consulting relationship do you a) particularly like, and b) particularly dislike?
CS

11. In what way(s) could the state staff be more helpful to you?
CS

12. Have you made recommendations to the state staff for changes in guidelines or procedures? If yes, were the changes made as a result of your suggestions? If the changes were not made, do you feel your suggestions were given fair consideration? Was a satisfactory explanation given to you as to why your suggestions were not implemented?
CPS

Coordination with Other Community Facilities

1. How many facilities and agencies do you contact on a regular basis for the purpose of maintaining facility interest or for the purpose of coordination? Provide a list of names.

C

2. How frequently do you contact these facilities (e.g., weekly, monthly, etc.)?

C

3. What is your method of contact (e.g., send reports, informal telephone call, informal socializing at lunch or after work, committee or advisory board meetings, resource file up-dating, I & R service, etc.)?

C

4. What proportion of the total number of facilities in your area do you contact on a regular basis? Are you satisfied with this level of coverage?

C

5. What barriers have you come across in making such contacts? What are you doing to overcome these barriers?

C

6. How would you rate the general cooperativeness of other facilities in your area (1 = excellent, 2, 3, 4, 5 = poor)?

C

7. What could be done to improve the cooperativeness of other facilities in your area?

C

8. Are you satisfied with the use that is being made of your center by community facilities and professionals?

C

9. Has your center been approached by other I & R centers, or groups planning an I & R service? If yes, describe who, when, and what happened?

C

10. Has your center ever initiated contact with other I & R centers or programs? If yes, list names, dates, and what happened?

C

11. Are there other facilities or agencies with which you have directly shared your I & R files, or which rely on your center for specific services?

C

12. How many other I & R centers, not in WIS, are coordinating efforts with your center (e.g., sharing resource file information, sharing administrative or support functions, etc.). Please list them.

C

13. Which components of your center's service do others wish to share (e.g., use resource file, forms, volunteer staff, etc.)? Which elements do they prefer not to become involved with? Why?

CS

14. What conditions have those considering coordination with your center set as desirable or necessary to meet before coordination actually takes place?

CS

15. What is the likely (or actual) effect on your area if coordination does or does not take place?

CS

16. What problems and/or unexpected benefits have arisen since the initial resource file interview with regard to your center's relationship and acceptance in your area?

C

Data Collection and Use

1. What is your general reaction to the collection of data with regard to your overall work at your center (i.e., is there too much, too little, or just enough demand in this area)?

C

2. With regard to specific forms, given your evaluation in terms of importance (usefulness to you and to others to whom you are responsible) and in terms of "nuisance" factors. Should any be discontinued after the demonstration?

CPS

Forms	Important			Nuisance			Discontinue		
	Yes	No	?	Yes	No	?	Yes	No	?
Facility File Form									
J Sheet									
Code Card									
Cross-Reference Card									
I & R Worker Report									
Caller Interview Form									
I & R User Survey									
I & R User Survey-Outreach									
Escort/Transportation									
Record of Grant Expenditures									
Publicity									
SEARCH Inventory									
Resource File Record									
Other									

3. How helpful or useful have you found the monthly data reports (1 = very, 2, 3, 4, 5 = not at all)?

CPS

4. Which aspects of the monthly data reports have you found the most and the least helpful? Rank each section:

CPS

Problems presented _____

Actions taken _____

Role of the center _____

Description of users _____

User satisfaction _____

Results of users' actions _____

5. What changes, additions, or deletions, would you like to see in these reports?

CPS

6. What specific changes in [your] center['s] operations have resulted from information contained in these reports?

CS

7. List all uses you have made of these reports (e.g., for presentations to your board or supervisior, information to other facilities in your area, etc.).

CPS

8. Have WIS reports been used or made reference to by others? Give examples.

CPS

9. What attribtutes of WIS reports lead to their use or non-use?

CPS

10. Have you received requests for WIS reports? From whom? When?

CPS

11. What special reports about WIS or WIS data has your office prepared?

CPS

12. Were these reports a) derived from existing WIS data reports; b) prepared from data on hand from other sources (specify source); c) prepared from additional data sought from the state office or other centers (specify)?

CPS

13. How do you use I & R data (e.g., for feedback to supervisors; reporting to your board; preparing reports for planners either in your host agency or outside of it)?

CPS

14. Do you have a list of regular "consumers" to whom you routinely provide copies of all reports that result from your WIS data (obtain list)?

CPS

15. Do you feel you are reaching all members of the potential audience of report consumers? If not, what are the barriers in reaching them? Who is not being reached? What steps are being taken to overcome the barriers?

CPS

16. What changes or recommendations for change in service facility policies have resulted from information contained in your reports?

CPS

17. Are there any special conditions which help to account for the acceptance (or lack of interest) of WIS data (e.g., revenue sharing, funding cut backs, new emphasis on program evaluation, lack of publicity about reports and data available)?

CPS

18. What effect on the community have WIS data made (e.g., new programs started or proposed)?

CPS

19. What alternative methods of dissemination might be more effectively used in communicating findings discussed in reports?

CPS

20. Have you sent reports specifically to planners (obtain list)?

CS

21. In addition to sending out reports, what other contacts with planners have you made (obtain list of presentations, etc.)?

CS

Planning

1. List the various inputs that you regularly use in making plans and decisions about human service programs for your constituency. Rank these including information available from WIS, according to the weight they carry in making your decision.

P

2. What is your general impression about the usefulness of the I & R network as a source for human services planning information?

P

3. What are particular strengths/weaknesses of the network in providing planning information?

P

4. What specific uses have you made of WIS information in planning human services for your constituency?

P

5. In what way(s) could WIS information be changed or improved to be more useful to you?

P

6. Assuming that WIS information were in a form completely as you would like it, to what degree would it play a role in the overall planning process? Please rank with regard to other inputs.

P

Policy and Legislation

1. What, if any, legislation has been passed during 1971-1974 with regard to improving access of older citizens to human services?

P

(a) National

(b) State

2. Describe policy statements, recommendations or proposals made by your office with regard to the issue of service access for your constituency.

P

3. What specific projects, grants, or other activities have been conducted directly or supported by your office in the area of service access? (Obtain documentation - reports, press items, etc.)

P

4. As a result of these activities, have services become more accessible to your constituency? What documentary evidence is available to support this conclusion?

P

5. What effect, if any, has a change in the accessibility of services had in the over-all quality of life for your constituency? What documentation is available to support your conclusion?

P

6. Was service access among the policy issues dealt with by your office this past year? What other policy issues were dealt with by your office this past year? In terms of priority, where did service access fall among policy issues?

P

7. What rank would you assign to the WIS Network with regard to importance among all other actions taken to deal with the service access issue?

P

8. How have you gone about policy formulation in the area of service access? What method(s) seem most effective and efficient in accomplishing policy formulation in this area? (E.g., consumer input, research, and service provider inputs)

P

9. Discuss the attributes of these different methods which contribute to the success or failure of policy formulation and the actual policies proposed in this area.

10. Would you recommend the development of a statewide I & R network to administrators in other states who are concerned about improving the access to human services of older people?
P

11. What are other alternatives for improving access to human services? Please rank the I & R network approach with relation to these alternatives.
P

Research and Evaluation

1. What are your general reactions to the research aspects of the demonstration?
CPS

2. Are you aware of specific problems in providing direct service or in managing your center that result from the research aspects of the project?
CPS

3. What is your personal reaction to the research and evaluation aspects of the project with regard to its fairness, biases, etc.?
CPS

4. What changes in program operation would you expect to see once the research phase ends? What changes would you recommend take place once the research phase ends?
CPS

5. Which aspects of the research do you feel are the most and the least important? Why?
CPS

6. Would you find it difficult to stay in you job if the level of research effort did not decrease?
CPS

7. What specific suggestions, recommendations, or changes in research activity would you like to see take place for the balance of the project?
CPS

8. Would you work at another job if it were to have built into it the level of research activity that is built into this one?
CPS